

**ANGLIA RUSKIN UNIVERSITY**

**ECOTOURISM AS A MECHANISM TO ACHIEVE SUSTAINABLE  
DEVELOPMENT IN INDIGENOUS COMMUNITIES OF MEXICO**

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**A thesis in partial fulfilment of the  
requirements of Anglia Ruskin University  
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Doctor of Philosophy**

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**ANGLIA RUSKIN UNIVERSITY  
ABSTRACT**

**LORD ASHCROFT INTERNATIONAL BUSINESS SCHOOL**

**DOCTOR OF PHILOSOPHY**

**ECOTOURISM AS A MECHANISM TO ACHIEVE SUSTAINABLE DEVELOPMENT IN  
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Sustainability has become vitally important in recent decades, especially in developing countries with high percentages of indigenous peoples and serious problems related to poverty in rural areas. In several countries of Latin America, indigenous communities are valued for their unique features, cultural attractions and diversity of their landscapes, however, these communities do not have many options for their subsistence. Ecotourism can be a reliable source of sustainable economic development in regions with fewer options, given that the nature of the ecotourism product can be founded upon the cultural and ecological capital of indigenous peoples, taking place in biodiverse natural areas, employing vulnerable local groups, engaging with local businesses, and the informal sector. This doctoral thesis critically assessed and examined the potential of ecotourism to support the global sustainable development goals (SDGs) for ecological protection and poverty reduction in indigenous communities of Latin America; with particular reference to two ecotourism projects led by the Hñahñu community of El Alberto, state of Hidalgo in central Mexico. This research project analysed key literature concerning the evolution of sustainable development on planning and policy-making towards the importance of indigenous sustainability. Furthermore, by employing the tourism value chain analysis (TVCA) during the fieldwork research it provides insights in the context of stakeholder engagement and ownership and documented benefits of indigenous peoples informal participation within the ecotourism market. Also, through the TVCA, the impacts of ecotourism strategies on the livelihoods of indigenous peoples are empirically evaluated, and the benefits that these bring to achieve poverty reduction through sustainable development. The research findings suggest that ecotourism represents a viable source of support for the achievement of the global SDGs in regions with few other options, and that a good performance of the TVC can significantly improve ecotourism management and foster sustainable development and poverty reduction within the process, providing as a refreshing counter-example to several well-publicised failures, an account of an indigenous community that has succeeded in its ecotourism projects against all odds. The conclusions relating to the sustainable development of the ecotourism projects in indigenous communities were drawn into a conceptual framework based on key recommendations that can assist the Hñahñu community of el Alberto to overcome constraints among their TVC and strengthen their ecotourism endeavours. The lessons learned from the Hñahñu ecotourism projects can be also used by other indigenous peoples in similar conditions, these include: the weight of community engagement in ecotourism through indigenous inception as a local initiative, transparency and accountability; gender equality, effective marketing; the role of the government; and the right involvement of the private sector.

**Key words:** Sustainable development, ecotourism, indigenous peoples, poverty reduction, tourism value chain, sustainable development goals.

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## LIST OF ACRONYMS

ACHR	American Convention on Human Rights
AFE	Action for Enterprise
CDI	National Commission for the Development of Indigenous Villages (Mexico)
CEC	Commission for Environmental Cooperation
CI	Conservation International
CISDL	Centre for International Sustainable Development Law
CONAFOR	National Forestry Commission (Mexico)
CONANP	National Commission of Protected Natural Areas (Mexico)

CONEVAL	National Council for the Evaluation of Social Development Policy (Mexico)
CPTM	Mexican Tourism Board
FAO	Food and Agriculture Organization
FIAS	Facility for Investment Climate Advisory Services
FINRURAL	Rural Financial (Mexico)
FONATUR	National Fund for Tourism Development (Mexico)
GIZ	German Federal Enterprise for International Cooperation
IACHR	Inter-American Commission on Human Rights
ICT	International Trade Centre
IFAD	International Fund for Agricultural Development
IFC	International Finance Corporation
IISD	International Institute for Sustainable Development
ILO	International Labour Organisation
INAH	National Institute of Anthropology and History (Mexico)
INEGI	National Institute of Statistics and Geography (Mexico)
IUCN	International Union for the Conservation of Nature
IWGIA	The International Work Group for Indigenous Affairs
JPOI	Johannesburg Plan of Implementation
MDG	Millennium Development Goals
SME	Small and Micro Enterprises
NAPECA	North American Partnership for Environmental Community Action
NGO	Non-Governmental Organizations
ODI	Overseas Development Institute
PEZI	Ecotourism Program in Indigenous Zones (Mexico)
PNPM	National Program for Community Empowerment (Mexico)
PROFEPA	Federal Attorney of Environmental Protection (Mexico)
PTAZI	Programme of Alternative Tourism in Indigenous Areas (Mexico)
RIH	Indigenous Hñahñu Network (Mexico)
RITA	Network for Alternative Tourism of Mexico
SAGARPA	Ministry of Agriculture, Livestock, Rural Development, Fisheries and Food (Mexico)
SCP	Sustainable Consumption and Production (Mexico)
SE	Ministry of Economy (Mexico)
SECTUR	Ministry of Tourism (Mexico)
SEDATUR	Ministry of Agrarian Development, Territorial and Urban (Mexico)
SEMARNAT	Ministry of Environment and Natural Resources (Mexico)
SDG	Sustainable Development Goals
SNV	Netherlands Development Organization
SRA	Ministry of Agrarian Reform (Mexico)
STEP	Sustainable Tourism Eliminating Poverty
TIES	The International Ecotourism Society
TPRP	Tourism-led Poverty Reduction Programme
TVCA	Tourism Value Chain Analysis
UNCBD	United Nations Convention on Biological Diversity
UNCED	United Nations Conference on Environment and Development
UNCSD	United Nations Commission on Sustainable Development
UNCTAD	United Nations Conference on Trade and Development
UNDESA	United Nations Department of Economic and Social Affairs
UNDRIP	United Nations Declaration on the Rights of Indigenous Peoples
UNDP	United Nations Development Program
UNEP	United Nations Environmental Programme
UNESCO	United Nations Educational Science and Cultural Organization
UNFCCC	United Nations Framework Convention on Climate Change.
UNGA	General Assembly
UNPFII	United Nations Permanent Forum on Indigenous Issues
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
VCA	Value Chain Analysis
WCED	World Commission on Environment and Development
WCHR	World Conference on Human Rights
WSSD	World Summit on Sustainable Development
WTO	World Trade Organization

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# **CHAPTER ONE - Introduction**

## **1.1 Introduction and Thesis Statement**

In the 2015 Sustainable Development Goals (SDGs), the United Nations (UN) and thousands of partners commit to promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all. By giving access to decent work opportunities in the tourism sector, which currently provides 1/11<sup>th</sup> jobs worldwide, societies can benefit from increased skills and professional development. At Target 8.9, this is recognised, when countries commit by 2030 to “devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products”. Further, a tourism sector that adopts sustainable consumption and production (SCP) practices can play a significant role in accelerating the global shift towards sustainability. To do so, as set in Target 12.b of Goal 12, it is imperative to “Develop and implement tools to monitor sustainable development impacts for sustainable tourism which creates jobs, promotes local culture and products”. Indeed, attention is now beginning to focus, worldwide, on developing sustainable tourism practices. However, renewed efforts are needed for countries to develop, in an informed manner, the policies and programs that can deliver this ambitious agenda. Prior research yields mixed findings in relation to ecotourism, sustainable development, poverty reduction, indigenous peoples and tourism value chain analysis (TVCA). Most field research, however, still consists of thematically or geographically specific case studies that are particularised, rather than providing in-depth, coherent and structured findings based on the current literature and the integrated application of relevant new approaches. For instance, in Mexico and other Latin American countries, the TVCA is a fairly new research approach that has not yet been widely applied. It has been focused on pro-poor tourism (PPT), but much less on ecotourism and sustainable development. This doctoral thesis aims to undertake TVCA in ecotourism venues based in two indigenous community projects of Mexico, and consider the outcomes in an integrated manner for sustainable development. Findings of the study will be used to develop a conceptual framework that assists indigenous peoples to strengthen their ecotourism endeavors. As such, this thesis seeks to contribute to investigations, and current literature, on whether sustainable development and poverty reduction objectives can, realistically, be achieved through ecotourism

projects among indigenous communities. By activating the tourism value chain (TVC) approach, this study uncovers whether a good performance on the TVC can improve ecotourism management and foster sustainable development and poverty reduction within the process. In addition, the conceptual framework is tailored to provide useful guidelines for indigenous communities in similar conditions, especially in Latin America. The outcomes of this research, which has been supported by the Centre for International Sustainable Development Law (CISDL), will be analysed and conveyed to policy and law-makers in developing countries in order to assist in the development of legal and institutional reforms for more sustainable tourism, and to inform CISDL's international sustainable development law and policy programmes in Latin America. The findings of this research will lead to a working paper, which, along with the guidelines, will be the first paper in the field of ecotourism to be published by the CISDL.

## **1.2 Background of the Study**

The concept of sustainability has become vitally important in recent decades, as the United Nations and many countries increasingly recognise that it is no longer possible for our societies to develop only through unlimited exploitation of natural resources and resulting environmental impacts. Indeed, in 1987, the report of the Brundtland Commission, *Our Common Future*, was published pointing out the challenges and opportunities for the implementation of sustainable development plans. The concept of sustainable development embraced the requirement to satisfy the needs of the present without compromising the needs of future generations (WCED, 1987). After the Brundtland report, there was a surge of sustainable development-related declarations and conventions in which governments agreed to take action by adopting on different series of strategies towards sustainability. These focused on the importance of integrating social and environmental concerns into economic development such as health, education, poverty reduction and sustainable use of the natural resources (Segger and Khalfan, 2004). The political will may well exist. But the practice of these strategies on the ground has proven fraught with challenges, often very specific for the time, place, people, and environments in question.

It has been argued that because foreign private sector interests often drive tourism, it is not well placed to contribute much toward national ecological or social objectives. From this perspective, tourism can even disadvantage both ecosystems and the poor, causing environmental degradation, increased costs of living for local people, and loss of local access to resources. To date, tourism has been viewed as an engine for economic growth rather than as a mechanism to deliver poverty reduction or the protection of nature (WTO, 2011). However, ecotourism might offer an alternative, as a primary social and economic activity in development, one which can embrace and incorporate sustainability principles, thus playing an important role. This is key for the implementation of Agenda 21, which highlights ecotourism as a useful economic instrument and a sector to support sustainable development priorities of importance to indigenous peoples. Indeed, as declared in 1992 Rio Earth Summit, the 2002 Johannesburg WSSD and the 2012 UNCSD Rio+20 inter-governmental processes, ecotourism is a fast growing sector that holds real potential to support sustainable development in developing countries. Further, as recognised in the UNDRIP and the 2015 Sustainable Development Goals (SDGs), ecological and cultural tourism can provide opportunities for more sustainable livelihoods which can and should be able to assist indigenous communities.

Mexico and Latin America have high percentages of indigenous peoples, and serious problems related to poverty, especially in rural natural areas. Ecotourism may be a viable source of sustainable economic development in regions with few other options. The nature of ecotourism products means that it often draws on the cultural and ecological capital of indigenous peoples, employing a high proportion of vulnerable local groups, and engaging local businesses including small and micro enterprises (SMEs) and the informal sector (WTO, 2002). This suggests that there is a convincing rationale for ecotourism to address sustainable development. On the other hand, the governments of developing nations and development assistance agencies have insufficiently supported ecotourism. This needs to change, and governments have started to recognise these realities. Ecotourism is now a primary sector of many developing nations and their economies. In Mexico, for instance, the National Development Plans (PND) 2009-2012 and 2013-2016 focus both on protecting natural areas and also ensuring gainful employment and the improvement of less developed regions; the countries' tourism policies prioritise actions and commitments to support ecotourism

development projects in rural and indigenous areas, calling for a focus on financing programs and training for SMEs as well as individual businesses. Thus, to ensure that an important economic sector like ecotourism can be successfully used as a tool for sustainable development, contributing to both poverty alleviation, and protection of ecosystems, more practical research is needed to assess challenges and suggest improvements.

### **1.3 Thesis Objectives and Research Questions**

This thesis explores the potential for ecotourism to assist in achieving poverty reduction and sustainable development in Mexico and Latin America by bringing critical reviews of the existing key literature together with field experiences and actual practices of the TVC performance in the indigenous community of el Alberto, in Ixmiquilpan, Hidalgo, Mexico. To achieve this aim, the thesis has four main objectives.

First, to recognise the evolution of sustainable development planning and policy-making, as well as its commitments towards indigenous peoples well-being in recent years. The research does this through the survey and critique of existing literature on the links between ecotourism, indigenous peoples and poverty reduction to achieve sustainability.

Second, to identify economic and non-economic benefits and impacts of the ecotourism project within the local community, especially those indigenous living under poverty conditions. This is addressed by mapping and interpreting the findings of the TVCA in the ecotourism project selected; through the examination of stakeholders' perceptions and the identification of drivers and barriers to SMEs as well as individual businesses.

Third, to develop a conceptual framework that contains key recommendations to assist the indigenous peoples subject of the current study by upgrading the performance of their TVC. This is addressed through the identification of leakages inside the TVC and whether new linkages, that benefit the local community, can be created to fill those gaps. To achieve this aim, it is also

necessary to analyse the strengths and constraints considering issues such as insufficient businesses and management skills, amenities and accommodation of the products and services offered by the venture, inefficient marketing, and lack of collaboration with the private sector.

Fourth and finally, the thesis builds on the preceding analysis to suggest key elements that could help others to support further development of indigenous ecotourism projects in Mexico and Latin America. These lessons include recommendations on the weight of community engagement in ecotourism through indigenous inception as a local initiative; transparency and accountability; effective marketing; gender equity; effective marketing; the role of the government; and the right involvement of the private sector.

### **Research Questions**

Four research questions outlined the reasoning for this thesis. These research questions constitute the main analysis in this case study to determine the importance of ecotourism to achieve poverty alleviation and sustainable development in indigenous communities of Mexico.

The four research questions are the following:

1. Have international commitments on planning and policy-making evolved to recognise the importance of indigenous peoples sustainability, and the role of tourism in this regard?
2. What are the financial and non-financial impacts that the ecotourism brings to the local community?
3. Is the Hñahñu ecotourism company financially viable?
4. Can poverty reduction and sustainable development goals, realistically, be achieved in indigenous communities through ecotourism projects?

## **1.4 Rationale for the Research Study**

Mexico has high percentages of indigenous peoples, and serious problems related to poverty, especially in rural areas. The *Otomis* of El Alberto in Mexico are indigenous communities valued for their unique features, cultural attractions and diversity of their landscapes. For these reasons, and given that these communities do not have many other options for their subsistence, ecotourism projects in these indigenous regions appear to offer a viable source for sustainable development. The purpose of this chapter is to inquire into the context of these two indigenous communities by providing diagnosis of their current situation and context (e.g. social, economic and cross-cutting issues) in order to have the necessary information to back up the TVC findings of the fieldwork. The purpose of this research is to examine the potential contribution of ecotourism to sustainable development that benefits both the ecosystem and indigenous communities. This is achieved through the critical analysis of the literature and the practical analysis of the tourism value chain in the Hñahñu community of El Alberto in Hidalgo, Mexico.

## **1.5 The Case Studies**

This case studies projects were built upon more than surveys of the literature; it is also based on analysis of the findings of the field investigation into actual practices on the ground, such as the performance of the TVC between ecotourism projects and their indigenous communities. Drawing on the researcher's fieldwork, the studies concentrates two ecotourism projects in the state of Hidalgo, Mexico they were selected case studies. The ecotourism projects selected are the EcoAlbertos Ecologic Parks (1) the Grand Canyon and (2) the Water Park in the community of the Hñahñu nation, EcoAlberto is located in the small village of el Alberto, which belongs to the City of Ixmiquilpan, in an area of significant ecological importance. This ecotourism projects are community-based i.e. managed by the Hñahñu members of the local community. EcoAlberto was initially built with the investments from the local level, not too much later the community granted funds to build infrastructure, financed by the Alternative Tourism in Indigenous Areas Programme (PTAZI) through a governmental organisation, the National Commission for the Development of Indigenous Villages (CDI).

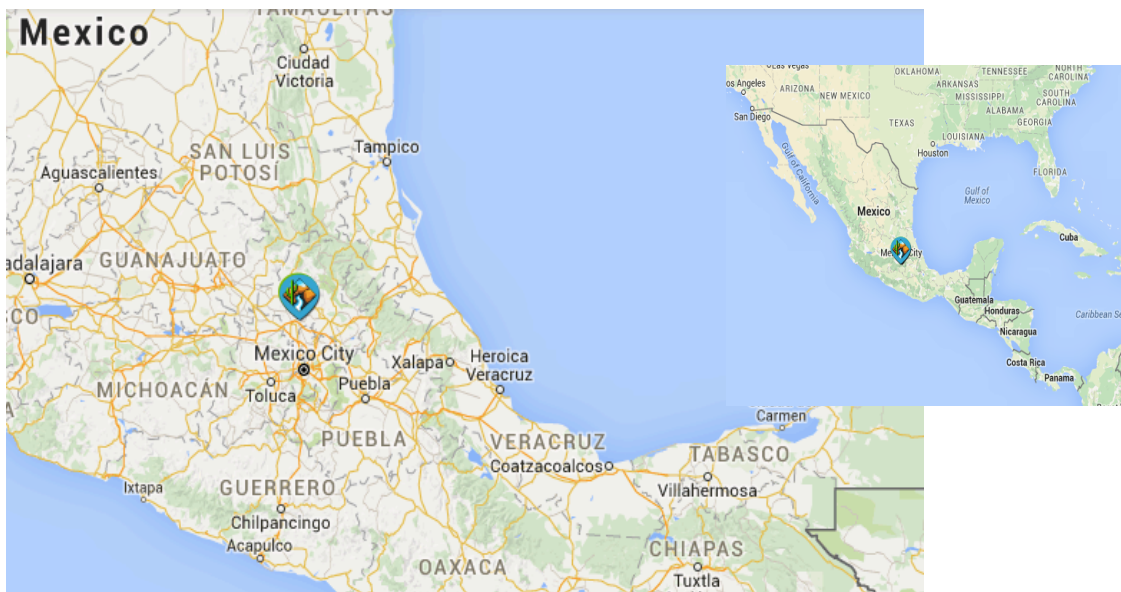
### 1.5.1 El Alberto, Ixmiquilpan, Hidalgo, Mexico

El Alberto, according to the National Institute of Statistics and Geography INEGI in Mexico (INEGI, 2010), has a permanent population of 834 inhabitants. These official statistics notwithstanding, the commissioner<sup>1</sup> and community residents estimate at least 2,000 Hñahñu members of El Alberto can be found in different cities of the US, and there were about 2,300 Hñahñu members in El Alberto at the time of the fieldwork (2014). The actual levels of immigration from el Alberto to the United States, currently, remain uncertain due to such discrepancies, however, community authorities (e.g. Hñahñu chiefs, local officials) and other studies on migration (Malgensen, 2001; Sarat, 2010; La Jornada, 2011) agree that close to 90% of the El Alberto's population, either live across the border or have migrated at least once.

#### Access to the Place and Location

From the city of Pachuca (capital of Hidalgo State), towards Actopan Colosio Boulevard, after reaching Ixmiquilpan, 8.5 km along the road to Cantinela is the Ecotourism Center Grand Canyon, with the EcoAlberto Water Park a few metres nearby (see map 1)

Map 1. El Alberto, Hidalgo Mexico



Source: Google Maps, 2016

<sup>1</sup> Indigenous authority, selected by the locals without official governmental engagement.



## Natural Aspects

The Mezquital Valley is divided into different slopes: on the north, the Ixmiquilpan Valley; on the south the Actopan Valley; and northwest, a plain comprising the northern part of the municipality of Ixmiquilpan and The Cardinal, where the Hñahñu community of El Alberto is established. These three valleys are not uniform and other platforms include slightly uneven terraces, separated by undulating terrain. The mountains surrounding the Mezquital Valley are solid with heights between 2.500 and 3.000 meters above sea level. The valley is dry and clay, with semi-desert landscapes, where there is only greenery on the banks of rivers and among a few wetlands ( Fielwork 2013).

The growth of the wildlife is sparse in this area, however, in the region of the lakes, it is possible to encounter sightings of species characteristic of this ecosystem such as rabbit, hare, fox, armadillo, opossum, squirrel, bat, coyote, rattlesnake, falcons, eagles, herons, ducks, and turtles. The vegetation consists of mesquite, acacias, pepper trees and cypresses on the banks of the river, otherwise, it is a very dry area (Fieldwork, 2013).

## Conservation

El Alberto has a wastewater treatment plant, organic and inorganic waste management, and awareness of the care and respect to natural resources in the region. During the period of the fieldwork, the managers were planning to purchase solar panels.

## Cultural Aspects

Hñahñu people are an ethnic indigenous group directly descendant of the *Otomis*.<sup>2</sup> The population speaks Otomi and Spanish. *Otomis* are one of the most representative indigenous peoples of Mexico, with a highest concentration in *El Valle del Mezquital* (the Mezquital Valley) in the state of Hidalgo, a location with remarkable natural and cultural resources that attract visitors looking for adventure tourism and ecotourism. The community of El Alberto is well known in the region,

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<sup>2</sup> One of the early cultures of Mesoamerica, the Otomi were likely the original inhabitants of the central Mexican altiplano around ca 1000 CE (Ballesteros and Garcia, 2003; Sarat, 2011)

due to the unity and cohesion of its people and their commitment to community development. One of the main economic activities from El Alberto's inhabitants is the manufacturing of dairy products, also handicrafts and clothes made from *ixtle* (the fiber of the maguey and agave plant), and toiletries made of cactus derivatives such as aloe-vera.

### 1.5.2 Ecological Park EcoAlberto

Ecotourism development at Ecological Park EcoAlberto is visited for tourists looking into alternative tourism such as adventure tourism and ecotourism. EcoAlberto is divided in two parks: (1) the Ecological Park *El Gran Cañón* (the Great Canyon) and (2) the natural hot-spring Water Park, both are managed by a single 'company of solidarity' which belongs to the Hñahñu members of El Alberto collectively. Managers and staff are recognised for the community involvement and the sustainable use of its natural resources. In accordance, *El Gran Cañón*, the Ecological Park, is known in the region, due to its comprehensive planning and sustainable use of resources, as an ecotourism venture. The infrastructure of the place was been developed in harmony with its natural surroundings, for instance through the use of local materials for construction of certain infrastructure e.g. wood for holding bridges, stone and maguey leaves for cabins and the restaurants, et cetera.

**Map 2. Ecologic Park EcoAlberto: *El Gran Cañón* and the Water Park**



Source: EcoAlberto, 2016

Map 2 illustrates three kilometers as the distance between the Ecological Park *El Gran Cañón* of the left and the Water Park on the right.

## **Activities and Attractions**

EcoAlberto embraces two parks, the ecological park *El Gran Cañon* (the Grand Canyon) and the water park, separated by 3km. *El Gran Cañon* offers beautiful scenery and rock formations to practice zip-wire and rappelling with a drop of more than 30 meters, hiking and walking tours to observe local flora and fauna through a hanging bridge, boat rides along the river Tula, a playground and family recreation area for camping. At night, the Grand Canyon offers a spectacular show with torches and its primary attraction - *la caminata nocturna* (the night walk) - a guided role-played tour representing real experiences of Hñuhñü illegal migrants that have crossed the border to U.S. seeking better opportunities. Alongside, the EcoAlberto Water Park has an area of 650 m<sup>2</sup> with three swimming pools, two wading pools and slides of various sizes. According to the managers, the water park has a carrying capacity of 1,500 people. The pools are fed by natural hot springs with temperatures between 36 to 38 °C (Fieldwork, 2013).

### ***La Caminata Nocturna* or the Night Walk**

EcoAlberto started to gain popularity thanks to *la caminata nocturna* (the night walk), a hiking reenactment of the experiences of El Alberto's people when crossing the border between Mexico and United States. This attraction was implemented to warn people from the region what they may encounter at first if they try to cross the dessert on foot in order to reach the United States. According to the information provided by local authority, its estimated that at least 90% of the population has migrated to the U.S at least once in their lives. Thus, the Hñahñu members of El Alberto developed an innovative tourist attraction to communicate and educate people about a major national problem for their own purposes. Hence, the night walk was initially performed more to raise awareness among the local community about the perils that they could face if they decided to cross the border; rather than to generate revenues. However, the hike has become very popular giving its uniqueness, it is literally the only one of its kind, besides it allows the Hñahñu people to tell their own story about poverty, marginalisation and illegal immigration, it is seen as giving voice to the voiceless and agency to the disempowered.

## **Services**

The parks have 12 cottages that can accommodate up to 56 people. They are built to be family friendly and environmental sound, made with local materials (stone, wood and maguey leaf on the ceilings) and decorated with regional designs and materials. These cottages have all services that a tourist might expect, also a lobby, restaurant for 80 people, family huts, community store, restrooms, dressing rooms, showers for the camping area, swimming pools, playground, grills and parking.

## **Products**

One of the main community activities is the manufacture of dairy products, also clothes and artisanal handicrafts made from sisal (fiber of the maguey) and manta (a type of cotton fabric). These products are not limited suppliers of EcoAlberto. Among EcoAlberto's missions, is the promotion of Hñahñu traditions and cultural elements. One way in which the Hñahñu people have sought to implement this mission is by offering artisanal merchandise (e.g. handicrafts and consumable products) as gifts or souvenirs at the ecotourism parks. This merchandise is very distinctive of the region and the Hñahñu community.

Ecotourism development in *El Gran Cañon* is known for its comprehensive planning for the rational use of resources and the harmonic use of local materials in their construction, such as stone, wood and maguey leaf on the roofs of the huts, restaurant and other constructions.

## **1.6 Caveats**

While EcoAlberto seeks to achieve its goals as pro-poor and ecological tourism, the community faces both internal and external challenges. It is difficult, for instance, for the managers and staff of the ecological reserve and the water park to ensure that all waste management and pollution can be fully managed in a manner that is completely organic, or that every aspect of the operation of the facilities is carried out in a manner that benefits the local community, supporting the livelihoods, education and empowerment of the population. As is evident from differences between official population statistics and actual estimates of community leaders, even accurate information related to demographics can be difficult to obtain and maintain, in the region. The many challenges faced by the project are discussed further below.

## **1.7 Outline of Thesis Structure**

CHAPTER ONE introduces the thesis by setting the academic context of the doctoral investigation, laying out the background of the study, thesis objectives and questions of the central thesis. It also briefly introduces key essential information for the analysis of the case study. This chapter includes the principal introduction, identifies the issues, objectives and questions of the research. The chapter introduces the case study of the indigenous community that was investigated in the research. It explains the examination of the potential for ecotourism to support sustainable development that benefits ecosystems and reduces poverty in indigenous communities, and how this was done by carrying out literature analysis and fieldwork research in two ecotourism projects of EcoAlberto, the Grand Canyon ecological park, and the EcoAlberto Water Park in Hidalgo State, in Mexico. It also states the main contributions to knowledge and provides an outline structure of the thesis.

CHAPTER TWO reviews and analyses existing literature in the context of indigenous peoples, sustainable development and ecotourism, summarising current and ongoing discussions and debates. This chapter also explains the situation of why sustainable development is important for indigenous peoples due to their traditions, spiritual beliefs, connections with their land, and ecological balance of this

project and provides the context of the research. Firstly, it analyses the challenges faced by indigenous peoples and their communities, i.e. poverty, social exclusion, economic development, human rights and cultural survival. Secondly, it provides an analysis of the main arguments as to how ecotourism can act as a mechanism for sustainable development and poverty reduction in indigenous communities of developing countries, through review and critique of existing academic literature in the field. Thirdly, it identifies lessons learned from the literature reviewed such as examples to follow, and gaps arising within it. Finally, the conclusion explains how the present research will address the gaps found through the literature and clarifies how it differentiates itself from preceding research that has been carried out on the issues raised.

CHAPTER THREE of the thesis then provides a review of several case studies and methodologies in value chains, examining the purpose of a value chain in the study of tourism, and the emergence of Tourism Value Chain (TVC) techniques. It addresses how, in the field of tourism studies, the TVC research tool offers the possibility of analyzing the contributions of tourism to social and economic development. It does this by analysing and reviewing main impacts among existing literature and case studies done to date, such as challenges to its implementation, and barriers to local participation. Furthermore, the chapter highlights that tourism value chains are essential for developing countries; and considers how the participation of the local community among them can contribute to the achievement of sustainable development and poverty reduction objectives.

CHAPTER FOUR describes and analyses the research methodology approach selected and its utility in the field of tourism management and studies. This doctoral work adopted both quantitative and qualitative research designs. The chapter explains why the researcher selected mixed methods, and how they were appropriate as a way to conduct research in a specific path that leads the research process in order to provide answers to the research questions. It also explains how the case study approach was complemented by the triangulation technique in order to maximise the validity and credibility of findings. Further, it explains how, during fieldwork, the researcher gathered data by using the case study approach and the TVCA. It describes how the data collection plan was designed by adapting multiple VCA and TVCA of several studies and guidelines, to fit the specific and

particularised context of the present research. Moreover, given the nature of mixed methods, it summarises the data collection tools used in the field such as semi-structured interviews, survey questionnaires, field notes and direct observation.

CHAPTER FIVE provides the presentation, interpretation and discussion of the TVCA, summarises the evidence of the research findings of the data collected during fieldwork, and provides the outcomes of the research findings by analysing the challenges and opportunities to maximise the TVC efficiency among the case studies.

CHAPTER SIX serves to follow-up this data and suggest a plan of action that identifies practical opportunities to intervene within the TVC in the context of value creation, local presence, and financial flows. Furthermore, the plan includes an outline of strategies and recommendations that can help the indigenous communities (that have served as case studies) to detect if there are potential partners or possible collaboration activities and try to incorporate these for the benefit of their local communities. The chapter provides a conceptual framework of lessons learned and recommendations to assist practices and policies that might be relevant to other indigenous communities that have developed or would like to develop ecotourism projects in Mexico and Latin America. This chapter finishes by drawing together the research findings and addressing their broader implications for eco-tourism and pro-poor tourism industry in Latin America. It explains that ecotourism draws on the cultural and ecological capital of indigenous communities and employs a high proportion of local groups and engages SMEs including those from the informal sector. Consequently, it suggests, ecotourism may be a viable source for sustainable development in regions with few development options. By bringing together and highlighting the findings from the previous chapters, this chapter discusses the broader implications of the research. It does this by validating major issues in order to conclude whether further ecotourism projects may work in other indigenous communities of Latin America, and briefly summarising the key elements that can be useful for the effectiveness and improvement of pro-poor ecotourism in the region, to help countries and indigenous peoples to achieve the global SDGs.

## **CHAPTER TWO - The Role of Ecotourism in Achieving Sustainable Development and Poverty Reduction Among Indigenous Peoples**

### **2.1 Introduction**

In recent decades, the concept of sustainable development has been perceived as an opportunity to mitigate natural and social threats that have been building up through time due to the exigent growing needs of the world's population, and the related changes in production and consumption patterns. These threats, and the lack of certitude surrounding the operational utility of the concept, also affects practitioners from the tourism industry, where underlined multiple attempts to join sustainability with growth on the ground expose the risk that sustainable development becomes a prone concept which can cover a broad variety of conditions (Sharpley and Telfer, 2014).

This chapter sets out the main components of the academic debates in tourism studies concerning the ecotourism processes in the indigenous community, through a survey of the existing discussions and debates in the literature on indigenous peoples, sustainable development and ecotourism. First of all, the chapter introduces the theoretical underpinning of the research, and presents the underlying concepts, theories and authors that have set the path of this investigation. Second, it explains why, in tourism and other related literature, sustainable development is being recognised and posited as important for indigenous peoples due to their traditions, spiritual beliefs, connections with their land, and ecological balance. Third, it analyses the main challenges faced by indigenous peoples in their communities, worldwide, with a focus on the conditions that prevail in Mexico, i.e. poverty, social exclusion, economic development, human rights and cultural survival. Forth, it provides an analysis of how ecotourism may have potential to act as a mechanism for sustainable development and poverty reduction in indigenous communities of developing countries, through review and critique of existing academic literature in the field of tourism studies, drawing also from other disciplines as appropriate. Fifth, it points out lessons learned from the literature reviewed, such as examples to follow and gaps arising within it. Finally, the conclusion, explains how this doctoral research addresses the gaps found in the literature and clarifies how it differentiates itself from the others, therefore, answering objective number one of this thesis: to analyse and critique the



literature on the evolution of planning and policy making in the context of sustainable development, focusing on the particularised circumstances of ecotourism and indigenous communities.

## **2.2 Theoretical Underpinning**

The present research analyses how ecotourism can be use a tool to contribute to the reduction of poverty and the achievement of sustainable development indigenous communities, to attain this it is necessary to establish the theoretical underpinning of the research. Ergo, to comprehend the evolution of sustainable development and ecotourism policy-making and planning regarding indigenous peoples well-being, this chapter has comprehensively reviewed and analysed international conventions, commitments, and milestones of these terms chronologically. The literature reviewed includes mainly books, journal articles and declarations on theories on the field of sustainable development, ingenious peoples, ecotourism and other research that connects the three areas.

For instance, positions regarding sustainable development starting with its popularity in 1987 *the Brundtland Report (Our Common Future)* by the definition given by the World Commission on Environmental and Development (WCED); indigenous peoples affairs since 1989 with the *Indigenous and Tribal Populations Convention or ILO Convention No. 169*; and ecotourism theories mostly starting in 2002 (including commentaries on tourism since 1992) with the *International Year of Ecotourism*, and *the World Ecotourism Summit or the Quebec Summit*. Such positions are essential in the theoretical debate on sustainable development, indigenous peoples and ecotourism, and continue to be the foundation for contemporaneous literature referenced in this doctoral thesis such as: Jenkins, 2010; Barkemeyer et al., 2011, UNEP, 2011; UNRISD, 2011; Reddy and Wilkes, 2015; Viñuales, 2015 in reference to sustainable development. Greathouse-Amador, 2005; Notzke, 2006; Garcia-Moreno and Patrinos, 2011; Coria and Calfucura, 2012; Hall and Patrinos, 2012, Zeppel, 2006; and plenty of research by ILO (2005, 2006, 2007) in relation to Indigenous Peoples and Sustainability. And Dowling and Fennell 2003; Donohoe and Needham; Cole, 2006; Gössling et al., 2005; Gössling and Hall 2006; Weaver, 2006; Ashley et al., 2007; Weaver and Lawton, 2007; Ashley and Mitchell, 2009; Gössling et al., 2009; Mowforth, 2009; Bricker et al., 2013; in the context of Ecotourism.

## 2.3 The Scope of Indigenous Peoples and Sustainable Development

### 2.3.1 Sustainable Development

Ever since its appearance in the 1980's, the term sustainable development has been directly linked with sustainability, however, in the last decades, the world has witnessed its emergence into a widely used definition that embraces not only environmental, but social and economic aspects (Mebratu, 1998). It was in 1987 when the World Commission on Environmental and Development (WCED) *the Brundtland Report* or *Our Common Future* defined sustainable development as "development that meets the needs of the present without compromising the ability for future generations to meet their own needs" (WCED, 1987, p.43). Thus, it was not until *the Brundtland Report* that the term obtained truly global currency, although its underlying principles were not new. There is some evidence suggesting that the term was used even before The Stockholm Declaration in 1972, it was used perhaps centuries ago. According to Segger and Khalfan (2004) in the eighteenth century political economists such as David Ricardo and Thomas Malthus had debates that identified the existence of the term among nature-related studies, and to them, the term suggested environmental obstacles towards economic development. Centuries later, *the Brundtland Report* would announce that "Ecology and economy are becoming ever more interwoven - locally, regionally, nationally, and globally - into a seamless net of causes and effects" (WCED, 1987). Since then, the term sustainable development has been subjected to multiple debates, initiating with a simple definition which escalates into a very complex one, but always accommodating certain aspects such as economic, social and environmental (Hall and Page, 2006; Barkemeyer et al., 2011,). An interesting view raised by Reddy and Wilkes (2015) suggests that the attention of the model of sustainability changes according to the world's needs.

Thus, one of the most important principles related to sustainable development focuses on the need to integrate social and environmental concerns into economic development - still achieving economic progress, but in a manner that is more likely to last over the long term., to achieve sustainable development depends on raising awareness and participation of people and communities both

locally, and also around the world (Wearing and Neil, 1999; Jekins, 2010). Sustainable development has, however, been characterised as ‘the greatest dilemma of life on earth’, due to the challenging questions that it implies - how to meet the needs and demands of the world’s population without consuming all the ecological resources which support life and human well-being? (Wearing and Neil, 1999). To achieve sustainable development, the essential needs of all people, especially the poor, have to be met in order to secure a decent quality of life, but without violating human rights or destroying the environment that they all depend on.

### **2.3.2 International Commitments and Indigenous Milestones**

Over the past half century, understanding regarding the situation of indigenous peoples has been evolving in the global community, shaped by advances in the law on the environmental and on human rights (Richardson, 2001; Garcia-Moreno and Patrinos, 2011; Coria and Calfucura, 2012). As the UN underlines, while there is no universally accepted definition for “Indigenous Peoples,” there tend to be common characteristics among them, including that they often have small populations relative to the dominant culture of their country; they usually have (or had) their own language; they practice distinctive cultural traditions; they have (or had) their own land and territory, to which they are connected to at various levels; and they self-identify as Indigenous (UN, 2016).

In the United Nations (UN) and other international organisations such as the International Labour Organization (ILO), indigenous institutions and non-governmental organisations (NGOs) and the States that sympathise have sought to support indigenous peoples development opportunities, often through partnerships between governments and civil societies. International systems are changing and opening up, which can even lead to the involvement of indigenous peoples with other world leaders in dialogue and negotiation of agreements, and in the settlement of disputes in international environmental law (Zeppel, 2006; Doyle 2015, Viñuales 2008-2009). Indigenous peoples themselves are taking necessary steps to seek

more sustainable development by identifying themselves as political entities, and establishing governance and authority over their own territories (Hinch 2001; 2005; FPP, 2003; IFAD, 2003).

Through major international agreements, indigenous peoples have reached important milestones in recent years. Perhaps most important is the Indigenous and Tribal Populations Convention, 1989, better known as ILO Convention No. 169, which is a treaty ratified through the ILO by over 20 countries including many in Latin America, although it has yet to be signed by Canada and the United States (ILO, 2009). The ILO Convention 169 is considered by many indigenous leaders as a major step in the protection of indigenous peoples' rights over their territories, internal structure, legal status and choice of development models, also to improve living conditions and self-determination (Hendry; 2005; ILO, 2009, 2014). The convention does not define indigenous peoples, but instead outlines principles, goals and duties to achieve their needs, including for development (ILO, 2009).

The 1989 ILO Convention 169 initiated a trend towards recognition of indigenous rights; providing a foundation for many conferences and declarations to be negotiated and agreed. For example, in 1993, the World Conference on Human Rights (WCHR) called on countries to recognise the importance of indigenous peoples and commit to the promotion of their economic, cultural and social development as well as to ensure respect for their human rights (IFAD, 2003; ILO, 2009). Further, the Inter-American Commission on Human Rights (IACHR) ratified the American Declaration on the Rights of Indigenous Peoples in 1997, first proposed in 1995 by the Organization of American States (OAS). This declaration is based on reviews of the situation (at the time) of indigenous peoples and human rights in many countries of the Americas (IACHD, 1995 and 1997; ACHR, 1995; OAS, 2011). The Declaration recognises the need for empowerment of indigenous organisations and nations; respect of culture, environmental, social and community rights, especially towards their survival and the control of their territories; and eradication of poverty and discrimination (IACHD, 1997).

In 1992 at the UN Conference on Environment and Development (UNCED), better known as Rio Earth Summit, indigenous peoples were fully acknowledged as a 'major group' and were also enabled to participate in policy-making on sustainable

development. Poverty reduction was a particular concern among indigenous communities, alongside a deep commitment to the Earth Summit objective of to raising awareness of ecological concerns and committing to protection of the environment and development worldwide (Spector et al 1994; Thornberry, 2002; IWGIA, 2012). The Earth Summit outcomes included the Rio Declaration on Environment and Development and an Agenda 21 for sustainable development, also treaties like the UN Convention on Biological Diversity (UNCBD), and mechanisms like the UN Commission on Sustainable Development (UNCSD), which sought to agree global priorities to end poverty, protect biodiversity and promote sustainable development in all sectors (UNCED, 1992; UN, 1997). For instance, Agenda 21 is a global action plan in pursuit of economic, social and governance that recognises a special role for indigenous peoples, alongside women, children and youth, and local authorities in securing sustainable development (Kates et al, 2005; Colchester, 2004; Viñuales, 2015). The Rio Declaration and Agenda 21 is voluntary, but they set a framework for cooperative implementation by the UN, its agencies, and all the governments which signed onto it at Rio, on local, regional and national levels with the support of the communities, NGOs and inter-governmental authorities (UN, 1997; Sharpley, 2000; Carter, 2001; Viñuales, 2015). After the Earth Summit, further conferences took place which also included the priorities of indigenous communities, the environment and sustainable development, for example the International Conference on Population and Development (ICPD) in 1994, the World Summit for Social Development (WSSD) in 1995 and the UN Conference on Human Settlements (Habitat II) in 1996 (Richardson, 2001). The UN Commission on Sustainable Development (UNCSD), which was created in 1992, also met each year and included discussions on the need for indigenous people to access sustainable development. Through the UNCSD, governments and other actors collected data and reviewed the implementation of Agenda 21 and the Rio Declaration (UN, 1997; UNCSD, 1997; Colchester, 2004; Kates et al., 2005).

In monitoring the outcomes of Earth Summit and Agenda 21, the UN identified room for improvement across the international system, and among governments. The key, it was agreed, was to agree on a new development agenda, one which all countries, non- Therefore, in the year 2000, the UN launched the Millennium Summit - We the Peoples: The Role of the United Nations in the 21<sup>ST</sup> Century. 'The Millennium Declaration of the United Nations' committed governments

and inter-governmental organisations, among others, to a global partnership to achieve eight global development targets as Millennium Development Goals (MDGs) (UN, n.d.). The MDGs addressed many key priorities of indigenous people, including to eradicate extreme hunger and poverty, and reduce child mortality, also to improve gender equality, maternal health, education and environmental sustainability, among other goals 2015 (World Bank, 2002; WTO, 2005; Taylor 2008; Hall and Patrinos, 2012)

Indigenous peoples were not explicitly prioritised in the original MDGs. However, a follow-up report entitled 'Road Map Towards the Implementation of the United Nations Millennium Declaration' approved by the UN Secretary General and the General Assembly in 2001, acknowledges indigenous peoples' rights and the need for their perspectives to be taken into account in order to achieve the MDGs (UNGA, 2001). Further, in the world's Sustainable Development Goals (SDGs), which were launched in 2015 in New York at the United Nations General Assembly and replace the MDGs, pro-poor development and sustainable tourism are highlighted as important priorities, and elements of solutions (UN, 2015).

In parallel to these developments, as the UN General Assembly (UNGA) Resolution 48/163 declared, the 'Partnership of Action' through the 1995-2004 First International Decade of the World's Indigenous People was launched in 1993. The Partnership sought to raise awareness and stimulate commitments for education, health, environmental development and human rights for indigenous peoples (IFAD, 2003; UNGA, 2005; UN, n.d.). As reported by the International Working Group for Indigenous Affairs (IWGIA), during this decade indigenous peoples worked to develop plans and projects for protection of their human rights. For example, indigenous peoples, with the support of the UN and NGOs, developed plans and programs guided by their own principles and policies (IWGIA, 2012a).

Figure 1. Indigenous Peoples Decade - Accomplishments 1995-2004

- Announcement and celebration of an annual Indigenous Peoples Day.
- Appointment of a Special Rapporteur on Indigenous Peoples by the Commission on Human Rights.
- The creation of a Fellowship Programme within the office of the High Commissioner for Human Rights.
- The initiation of a Voluntary Fund for indigenous peoples to support their ideas and plans of action and increase their involvement in UN gatherings.
- The emergence of the UN Permanent Forum on Indigenous Issues (UNPFII)
- Negotiation of the UN Declaration on the Rights of Indigenous Peoples (UNDRIP)

Source: adapted from IWGIA, 2102a

In 2002, the UN Permanent Forum on Indigenous Issues (UNPFII) took up the cause of indigenous peoples, as a new instrument for this purpose the UN system. Considered a universal instrument for human rights, this permanent forum meets every year in New York. The UNPFII provides a forum for exchange and cooperation on indigenous affairs associated with economic and social development, education, culture and environment matters. The UNPFII works to raise awareness of indigenous peoples' issues, and to address their priorities (UNPFII, n.d.a; IFAD, 2003; UNDG, 2008).

In parallel, the 2002 World Summit on Sustainable Development (WSSD) was held in Johannesburg, South Africa. The WSSD, taking place a decade after the 1992 Rio UNCED Earth Summit, sought to revive interest in the implementation of sustainable development, and to refocus world attention on lack of progress to end poverty and increases in environment degradation. The WSSD served as a reminder of the essential role of indigenous peoples for the achievement of sustainable development. To reaffirm sustainable development as a priority, the WSSD launched several important new policy initiatives, including the Kimberly Declaration, the Johannesburg Declaration on Sustainable Development, and the Johannesburg Plan of Implementation (IWGIA, 2012; WSSD JPOI, 2002; UN, 2006). First, in the Kimberly Declaration or International Indigenous Peoples Summit on Sustainable Development, indigenous peoples of the world declared their sense of responsibility for the planet's sustainability and forthcoming generations to provide peace, equity and justice. Second, in the Johannesburg Declaration on Sustainable

Development, governments reviewed the work done during the last decade since Rio Earth Summit, pointing out challenges and opportunities to further implement sustainable development, and recommitting themselves to achieve it (IISD, 2002). Third, in the Johannesburg Plan of Implementation (JPOI), governments agreed on a series of strategies towards sustainability, including for poverty reduction, health, education and sustainable use of the natural resources (IISD, 2002; Segger and Khalfan, 2004, Viñuales 2015).

At the end of the 1995-2004 decade, the UN General Assembly agreed to extend a Second International Decade of the World's Indigenous People 2005-2014 entitled 'A Decade for Action and Dignity', to build on the (limited) progress of the First International Decade. As the UN General Assembly agreed, the objectives of the Second International Decade (2005-2014) include the promotion of non-discrimination and inclusion; involvement in decision-making such as planning and policy-making, and development of projects and programmes (Cortassel, 2007; MacIntosh, 2013). The goals of the UNGA Resolution also include improvements in access to culture, health, education, human rights, economic and social development and environmental protection (IWGIA, n.d; UN, 2008a).

In 2007, as part of the Second International Decade, the General Assembly issued the UN Declaration on the Rights of Indigenous (UNDRIP or DECRIPS). In UNDRIP, which was widely ratified by governments, international recognition was granted for indigenous peoples human rights and sustainable development, including information, participation in decision-making and access to control over their territories and their natural resources (Waten and Yap, 2015; IFAD, 2003; IWGIA, 2012.). The declaration also provides a framework for negotiations between the international community and indigenous nations in order to generate mutual agreements for the safeguard of the indigenous peoples (UNDG, 2009).

Two decades after the first Rio Earth Summit (1992), a UN Conference on Sustainable Development (Rio+20) was held in Rio de Janeiro, Brazil. The conference introduced two topics: 'A Green Economy in the Context of Sustainable Development and Poverty Eradication' and 'the Institutional Framework for Sustainable Development' (UNCSD, 2012). One of the main results was global agreement on the need for global Sustainable Development Goals (SDGs) to build on and reform the MDGs. In this world's new Sustainable Development Goals, as



mentioned above, the importance of socially and environmentally sound development for local communities, sustainable tourism, and other strategies is underlined, as is the commitment to end poverty and support greater equity. The decision to set sustainable tourism and related Goals as world priorities in this manner is an extremely significant one for the field of tourism studies and for the situation of the world's Indigenous Peoples (Honey, 2003; UN, 2015; Doyle, 2015). New research and analysis may contribute towards their implementation.

Figure 2. Other International Treaties that Support Mechanisms for Indigenous Peoples Security

The Convention on Rights of the Child (1989)
The Convention of Biological Diversity (1992)
Agenda 21 (1992)
The International Convention on the Elimination of All forms of Racial Discrimination (1965)
The International Covenant on Civil and Political Rights (1966)
The International Covenant on Economic, Social and Cultural Rights (1966)
The International Conference on Population and Development (1994)
The UN Environmental Programme (UNEP) Malmoe Ministerial Declaration (2000)
The Beijing Declaration and Platform for Action (1995)
Accords of the UN Educational, Scientific and Cultural Organization (UNESCO)
The Universal Declaration on Cultural Diversity (2001)
The Convention on Protection and Promotion of the Diversity of Cultural Expressions (2005)
The Convention for the Safeguard on the Intangible Cultural Heritage (2003)
The Convention Concerning the Protection of the world Cultural and Natural Heritage (1972)

Source: adapted from UNDG, 2009

Through the UNCSD process, indigenous chiefs worked in collaboration with government delegates and various inter-governmental and NGO leaders towards one main goal; a commitment to make the global sustainable agenda deliver (IWGIA, n.d.). The conference also reinforces the political support within the promotion and protection of indigenous rights. Additionally, according to the International Group for Indigenous Affairs (IWGIA) indigenous peoples contributed many inputs to The Future We Want, the eventual Rio+20 outcome document (IWGIA, n.d.).

Figure 3. Five Key Messages from Indigenous Peoples for The Future We Want 2012



Source: adapted from IWGIA, n.d.

As a result of these global policy making processes, many frameworks for cooperation have been developed, and important international commitments have been made to address indigenous peoples need and desire for sustainable development. Many solutions have been identified at local, regional, national and international levels, and cooperation has been launched that will take many years to bear fruit.

While it is still an uphill struggle and many steps remain to be taken along the path to implementation of these declarations and Conventions, the world has agreed on important principles, and the focus is now shifting towards actions which can be taken to help deliver on their commitments, to implement the UNDRIP, The Future We Want Rio+20 Outcomes, and the emerging global SDGs.

### **2.3.3 Environment and Sustainable Development in Indigenous Peoples Lives**

According to the United Nations Sustainable Development Knowledge Platform, it is estimated that there are approximately 370 million Indigenous Peoples in the world, as part of 5,000 different groups, in 90 countries worldwide (UN, 2015). While about 70% of them live in Asia, they are found in every region of the world, including Latin America. Indigenous Peoples only constitute about 5% of the world's population, yet account for a higher percentage of the world's poor - about 15%, a large percentage of Indigenous Peoples do live in poverty today (UN, 2015). The Inuit of the Arctic, Native Americans, hunter-gatherers in the Amazon, traditional pastoralists like the Maasai in East Africa, and tribal peoples in the Philippines are examples of Indigenous Peoples. The majority of Indigenous Peoples today live in extreme poverty in rural or isolated areas in developing countries (IFAD, 2003). These rural areas are also, due to their relative isolation, often the most biologically diverse and environmentally significant reserves of their countries, with rich natural resources that remain less exploited, while also vulnerable to degradation.

Environmental concerns are considered a major factor in the potential for sustainable development of indigenous peoples. A healthy environment is crucial to maintaining a natural resources base such as land, water and vegetation, which often provide the means of subsistence and survival for rural populations (Hitchcock, 1994; Hitch, 2001; Hendry, 2005). Environmental degradation such as soil erosion, over-grazed pastures, and loss of watershed protection can be intensified due to poverty. Families on the brink of destitution can be led to consume the capital that could otherwise provide a basis for long-term survival (UNDP, 1997) Further, and to be more precise, degradation of natural resources also hits the poorest and most vulnerable groups, such as indigenous people, the hardest. There are multiple but direct and discernible relationships between the state of the environment in rural areas, and resulting social conditions, standards of living, levels of poverty and rates of out-migration to urban areas (European Commission, 2003; UNDP, 2003).

The areas in which indigenous communities are based are often rich in natural resources, but also highly vulnerable to degradation (IFAD; 2003: IWGIA, 2012). For instance, many of indigenous peoples ecosystems and communities are

jeopardised by climate change and environment degradation caused by the exploitation of natural resources in response to the increasing growth of commercial exploitation activities such as mining, logging and oil-extraction (IWGIA, 2012). These activities seldom benefit indigenous peoples themselves, but increase the chances of deforestation, soil erosion, desertification, extinction of species and water pollution. Consequently, economic growth that involves the creation of infrastructure that physically modifies the natural resources, not just endangers the environment, but also cultural survival and social livelihoods such as traditions and occupations (IFAD, 2003).

Indigenous peoples and sustainable development are linked, and each depends on the other. On one hand, indigenous peoples are custodians of traditional knowledge and experience, which values the wise and careful stewardship of their natural resources. They remain, globally, peoples with the deepest and most vulnerable reliance upon their natural surroundings. In addition, nearly all indigenous tribes identify themselves as uniquely bonded with their natural environment, culturally and spiritually identifying themselves as the guardians of the planet, acknowledging the Earth as their 'spiritual mother' and the creator of life (UN, 2007). According to their cultures, many indigenous people are mandated by their traditions to seek a balance between humans and environmental sustainability. The contribution and central place of indigenous peoples in sustainable development is well recognised (IWGIA, n.d.; IFAD; 2003). On the other hand, indigenous peoples are also deeply susceptible to unsustainability given the insufficient attention paid to their human rights, and stewardship rights over their territories. Moreover, indigenous peoples subsistence depends upon the use of their land and natural resources (IWGIA, n.d.). For example, indigenous peoples either have no infrastructure or they are affected by it, e.g. causing internal displacement, environmental pollution and the loss of culture and languages (UN, 2005). Therefore, sustainable development is a matter of essential concern among indigenous groups worldwide (IWGIA, n.d.).

### 2.3.4 Poverty and Social Exclusion of Indigenous Peoples

Indigenous peoples are identified, by the UN and international development agencies, as continually ranked among the poorest and least developed communities, particularly in developing countries where they also face tremendous social exclusion challenges such as discrimination, inequality and lower education (Patrinos and Psacharopoulos, 1994; World Bank 2005; Hall and Patrinos, 2012). Many indigenous peoples are excluded from the conventional economy of their nations. Given this exclusion, such indigenous communities suffer from substantial gaps and weaknesses in infrastructure, for example water supplies, roads, sewers, schools or health care facilities. The World Bank has become very active in working to address the issues directly affecting indigenous peoples, including poverty and social exclusion. As noted in the World Bank's *Indigenous Peoples, Poverty, and Development Report*, the MDGs should aim to bring indigenous peoples up to the same level of sustainable development and human dignity as the rest of the population in many countries of the world, and the World Bank can support countries to develop programs in this regard (World Bank, 2014).

Recent studies carried out by the World Bank cut across regions and societies, and include efforts to understand and document poverty among indigenous peoples including: *Indigenous Peoples, Poverty, and Development*; also *Indigenous Peoples, Poverty and Human Development in Latin America* (Patrinos and Psacharopoulos, 1994) and case studies with social development issues as: *Indigenous Peoples and Poverty in Mexico* (box 2.4) Garcia-Moreno and Patrinos (2011); *Census-based profile of the Pygmies in Gabon* (Yetna et al. 2011); *Socioeconomic status of the Pygmies in the Democratic Republic of Congo* (Achour, et al. 2011); *Ethnic disparities in China: Geography, Rurality, and Socioeconomic Welfare* (Hannum, 2011); and *Catching Up Slowly - Ethnic and Gender Inequalities in Lao PDR* (King and Walle, 2010). From these studies, it can be argued that there is a current lack of adequate attention in issues concerning poverty, social inclusion, unemployment, human rights, cultural survival and economic development among indigenous peoples in many developing countries, creating a barrier that makes it more difficult to meet the MDG targets for indigenous peoples. Furthermore, the outcomes of the studies mentioned above suggest that indigenous groups are significantly behind compared to the rest of the population.

Unfortunately, development interventions for indigenous peoples remain infrequent, inadequate and often unable to understand or respect their needs or interests. Lack of access to sustainable development threatens the cultural survival of many indigenous peoples, whose extreme poverty can be exacerbated by ongoing conflicts, deriving from lack of basic recognition that they exist as nations and as the rightful original inhabitants of their territories (IFAD, 2003; Hall, 2012; IWGIA, 2012;).

Sustainable development might contribute to the well-being of indigenous peoples due to the priorities that it places on ecological concepts of sustainability, and its recognition of the need for economic development and social inclusion (Scheyvens, 2000; Hendry, 2005; Notzke, 2006; Fennell, 2008; King and van de Walle, 2010). However, it is important to recognise that, as noted in the World Bank Report *Still Among the Poorest of the Poor*, as long as there is poverty for indigenous peoples, sustainability cannot be achieved (World Bank 2010). Poverty originates as a result of economic, political and social exclusion and for indigenous peoples, increases alongside environmental and natural resources degradation. Moreover, many indigenous groups around the world are forced to face social exclusion on an everyday basis. There are far too many instances globally where discrimination and marginalisation and poverty are wearing down the well-being and indeed, the right to life itself of indigenous peoples. Social and economic exclusion are costing indigenous peoples their dignity as human beings, potentially causing the degradation and loss of their valuable and sacred traditional knowledge, culture, languages and way of life. In many cases, it is existence itself, and cultural survival that is at stake (Garcia-Aracil and Winter, 2006; FPP, 2003; UN, 2009).

In response to the current crisis, attempts are underway to support the empowerment of poor indigenous communities towards recovery or attainment of their rights to political participation, economic development, social inclusion and cultural survival. For example, in Indonesia the members of the Suku Anak Dalam indigenous community have been victims of marginalisation and social exclusion (PNPM, 2013). International development agencies, including the World Bank, provide support to development projects such as the National Program for Community Empowerment (PNPM) Peduli, which supports such communities in

finding livelihood opportunities as well as reclaiming their lands (PNPM, 2013). Such efforts are valuable, but small, particularised and piecemeal. Scaled-up instruments and mechanisms from the national and international community are still needed, in many sectors of the economies of developing countries (IISD, 1995; Scheyvens, 2002). For poverty reduction and sustainability, as noted in the World Bank Report *Still Among the Poorest of the Poor*, important barriers and key factors remain which prevent the sustainable economic growth and the improvement of national and international policy frameworks for these people (World Bank, 2010). These barriers continue to affect indigenous peoples worldwide, and Mexico is a case in point.

#### **Box 1. Indigenous Peoples and Poverty in Mexico**

There is a significant gap in poverty among indigenous and non-indigenous peoples in Mexico, meaning that 75 % of indigenous peoples in Mexico are found among the poorest of the poor. As this case study reveals, poverty rates among indigenous peoples of Mexico have, however, finally begun to decline between 2004-2008. This recent decade is perhaps the first time that the indigenous population has seen real improvements in Mexico. The questions now revolve around how to accelerate and scale up success, in order to move closer to equity, and to closing the fairly large gap among indigenous and non-indigenous groups. As will be seen in the case studies in this doctoral thesis, it is possible that existing gaps are linked to lack of productivity, lack of access to services and discrimination against indigenous peoples.

Source: adapted from Garcia-Moreno and Patrinos, 2011

Indigenous peoples in Mexico continue to face notable disadvantages in social and economic development, making them the poorest among the poor. Although official statistics suggest that discrimination against indigenous peoples is decreasing, alongside poverty rates, a great deal remains to be accomplished. In order to improve their socio-economic environment, there is space for great progress through public policy reforms and actions on the ground. Recent research and analysis also suggests that government initiatives and education can be useful and important instruments in this respect (Garcia-Moreno and Patrinos, 2011; MacIntosh, 2013).

There is both a promise, and an obligation, to attempt to achieve these changes as quickly as possible. Indeed, recent sustainable development declarations and agreements specifically build commitments, instruments and programs, which underline and highlight these issues. Several key instruments

agreed in the processes explained above are now specifically targeting poverty, social exclusion and other related issues among indigenous peoples.

First, the United Nations system is devoted to fighting poverty, in the MDGs and in the upcoming SDGs. Many of the UN conferences and declarations specifically underline the need to reduce and eradicate poverty for indigenous peoples, including the Rio Earth Summit Declaration (1992) and its Agenda 21 (1992), the World Conference on Human Rights (1993) and its Social Summit (1995), the World Summit on Sustainable Development Johannesburg Plan of Implementation (2002) and the UN Declaration on the Rights of Indigenous Peoples (UNDRIP), as detailed above in the general discussion of international policy and law-making on indigenous peoples.

Perhaps the most focused and clear guidance in relation to these particular challenges is found in the UN Declaration on the Rights of Indigenous Peoples (UNDRIP), in which States have committed to the elimination of social inclusion and social change, emphasising and recognising that indigenous peoples should not live under constant discrimination, and deserve to be independent to practice their rights. Moreover, the UNDRIP supports indigenous peoples to manage their own economic, political, cultural and social affairs in a way that seeks to eliminate inequality, discrimination and oppression, and obliges States in good faith to take effective measures to achieve these objectives (UNDRIP, 2008). These commitments are embodied on the following articles:

**“Article 15 (2).** States shall take effective measures, in consultation and cooperation with the indigenous peoples concerned, to combat prejudice and eliminate discrimination and to promote tolerance, understanding and good relations among indigenous peoples and all other segments of society”.

**“Article 20 (1).** Indigenous peoples have the right to maintain and develop their political, economic and social systems or institutions, to be secure in the enjoyment of their own means of subsistence and development, and to engage freely in all their traditional and other economic activities.”

Source: UNDRIP, 2008



The UN Educational Science and Cultural Organization (UNESCO) is another of the UN agencies that is seeking to address indigenous peoples' affairs such as human rights, gender equality, discrimination, democracy, and migration (UNESCO, n.d.a). Indeed, UNESCO has also developed multiple instruments to address this issue. For example, the framework 'Knowledge Systems, Knowledge Diversity, Knowledge Societies: Towards a UNESCO Policy on Engaging with Indigenous Peoples' which is specifically designed to use instruments to evaluate the analysis of comparative policy in the context of inclusive policies for indigenous peoples.

As 'fourth world' Nations ranked among the poorest of the poor, indigenous peoples needs are highlighted in the 2012 Rio UNCSO outcome, 'The Future We Want'. In this Declaration and the resulting Millennium Development Goals MDGs negotiations, which concluded in 2015 with a follow up declaration: the Sustainable Development Goals SDGs where Heads of State from nearly all UN member countries accentuated the importance of positioning poverty reduction within the main objectives of the UN development programmes. They are committed to targeting what causes poverty from the core and constraints to plan and policies strategies at national and international stages. 'The Future We Want' was one the UN documents to first acknowledge the UN Declaration on the Rights of Indigenous Peoples (UNDRIP); by recognising "the importance of the UN Declaration on the Rights of Indigenous Peoples in the global, regional and national implementation of sustainable development strategies" (UNCSO, 2012). Although the statement was not very explicit, it showed a good start towards the inclusion of indigenous peoples in the context of these conventions and treaties.

This builds on the original Agenda 21, which in Chapter Three on 'Combating Poverty' recognised a "long-term objective of enabling all people to achieve sustainable livelihoods should provide an integrating factor that allows policies to address issues of development, sustainable resource management and poverty eradication simultaneously". As Agenda 21 suggests that in order to combat poverty and support, in the creation of health facilities and education, more policies must be put in place. It exhorts governments, with the assistance of NGOs and other agencies to encourage sustainability; it refers to indigenous peoples in particular in

“respecting the cultural integrity of indigenous and their communities” (UNCED, 1992).

Although indigenous peoples are not specifically highlighted in the SDGs, there were several SDG-based programs in different countries focused in the context of indigenous peoples. World leaders and the UN agencies worked hard to achieve progress towards the MDGs by 2015 and stated new targets within the SDGs in September 2015, and indicators for achieving the eradication of poverty speak specifically to the needs of indigenous peoples among the poorest of the poor (Kates, 2005; Waage, et al. 2010; UN, 2011, 2016). The new Sustainable Development Goals are even more clearly focused towards this end.

While interventions of programs and organizations are seeking to implement the commitments from the 1992 Rio Declaration and Agenda 21, the 2000 MDGs, the 2002 WSSD JPOI, the 2004 UNPFII, and the 2007 UNDRIP, and these global agreements are demonstrating progress in raising awareness of indigenous peoples needs and issues such as gender, health, education and some advance in human rights. Although, there are remaining conversations as to whether the ‘social pillar’ of sustainable development is 'actually' contributing to social progress; there is sufficient evidence in many developing countries that progress can be achieved. Indigenous groups can still be helped by improving sustainable development-based instruments and programs as those listed above in order to ameliorate indigenous peoples well-being.

### **2.3.5 Indigenous Peoples, Natural Resources and Inter-Generational Equity**

Land stewardship has many implications for the protection, sustainable use and degradation or restoration of the environment. The poor might have previously been perceived as directly responsible for the degradation of the environment and the unsustainable use of resources (Fennell, 2004; Coria and Calfucura, 2012). As noted by the World Bank and others, poverty can lead to unbalanced natural ecosystems, loss of diversity and large-scale deforestation. These factors can have a direct impact on the natural resources and are mainly caused by poverty and outmigration (World Bank, 1997; 2012). From this work, it was suggested that in certain situations, damages to the local environment cannot be effectively ceased unless rural livelihood disputes are suitably addressed, and should be made with an approach that focuses primarily on delivering support for sustainable livelihoods through long-term plans.

A second, equally compelling argument complements our understanding of this relationship between poverty and environmental degradation, however. Also according to the World Bank, environmental pressures such as climate change are not caused by poverty, but it is simply the poorest of the poor and the most vulnerable people who suffer their impacts the most, especially the indigenous peoples. From this (more nuanced) viewpoint, the degradation of ecosystems, the depletion and over-exploitation of land and natural resources, and other more serious damage to the environment is seldom caused by the poor. The poor are, however, the most vulnerable to these effects and impacts. While they may be least responsible, they suffer most. And this is a matter of justice (Richardson, 2001; World Bank 2013, 2014). As one compelling example, indigenous communities are very susceptible to climate change impacts, due that they are commonly based in naturally sensitive regions (e.g. rainforests, deserts, mountains, coastal zones, the arctic); furthermore, they rely on their natural environment for their maintenance and cultural survival (World Bank, 2014).

Alongside the viewpoints of blame and victimisation, it is also essential to recognise that indigenous peoples are often custodians of cultural knowledge that is highly important to securing effective adaptation and mitigation plans to fight against climate change. From this viewpoint, it is possible to go beyond and seek to respect,

indigenous peoples' cultures and traditions while supporting their nations in the creation of plans and actions in order to adapt to a changing environment and to mitigate greenhouse gas emissions regarding a low-carbon economy. For instance, the IWIGIA (2008) Conference on Indigenous Peoples and Climate Change concentrated on the main constraints that indigenous people face regarding climate change, issues such as conservation and human rights. Some negotiations went further that the climate change affairs and reached discussions towards the international mitigation policies, actions and requirements to support indigenous peoples adapting to climate change.

According to the UNFCCC (2009) the majority of the issues raised by indigenous peoples regarding climate change are towards decision-making and the execution of plans, these rights seem to be fully acknowledged in legal conventions and treaties such as Agenda 21. Working to target specific information and needs of indigenous peoples communities facing climate change, it may be possible to transform passive beneficiaries of sustainable development into active participants and stewards of natural resources and purveyors of their own sustainable livelihoods (World Bank, 2014).

The sustainability approach proposed in international conferences, declarations and treaties continues to focus on respecting indigenous peoples as voices and stewards of crucial local and global ecosystems, by recognising their role in protecting the biodiversity, including important endangered and threatened species (Armesto et al., 2001; UN, 2009; 2012). These principles and subsequent practices also seek ways to help indigenous peoples towards sustainable livelihoods in today's societies which satisfy human need for quality of life, while sustaining resources for present and future generations (WCED, 1987). Indigenous peoples are working to achieve this by preserving the capacity for natural resources or systems to maintain diversity and health, and by increasing their contribution towards sustainable management of natural resources (UNSD, 1999; Greathouse-Amador 2005; FAO, 2011; Watene, 2015). They deserve, from this point of view, all the possible recognition and support that can be provided. For many indigenous peoples, environmental protection is cultural survival.

## **2.4 Sustainable Development and Ecotourism: A Sustainable Way Forward for Indigenous Peoples**

### **2.4.1 Ecotourism**

The concept of ecotourism has been widely used since the 1980's, but it gained more popularity after 2002, especially among academics in the tourism literature. For instance, the environmentalist Ceballos-Lascurain coined one of the most widely recognised concepts in the 80's. Now, the term ecotourism has now plenty of definitions, most of these refer to it as a nature-based tourism activity (Weaver, 2006). Nevertheless, as other tourism-related concepts that have embraced social or/and environmental aspects, there has been huge discussing on what the 'ecotourism' definition should contain (Donohoe and Needham, 2006), turning the easy term into a complex one (Buckley, 2003), and with numerous positions that 'mean different things to different people' (Kiper, 2013).

Hence, the term ecotourism has become really popular, and as a result there is much debate around its meaning (Cater 1994; Weaver, 1999, 2006; Fennell, 2002; Donohoe and Needham, 2006) as a result, the concepts have expanded its meaning to include new characteristics such as ecotourism responsibility, environmentally friendly, destination management and sustainable development of local communities (Coria and Calfucura 2012). For instance, some debates refer on whether ecotourism is a form of sustainable development (Fennell, 2002; Eplerwood, 2002; Coria and Calfucura 2012), while other debates argue that is rather embedded with in educational practices (Buckley, 1994; Russell, 1994) and there are more authors that debate the connection to natural conservation and experiences (Ceballos-Lascurain 1987; TIES, 1990; Gössling, 1999; Honey, 2008; Hall and Page, 2009).

Table 1 introduces some of the main definitions of ecotourism throughout stated by researchers and organisations in the field throughout the years 1987-2008.

**Table 1. Ecotourism Concepts 1987-2008**

Author	Concept
Ceballos-Lascurain 1987	<i>"Traveling to relatively undisturbed or uncontaminated natural areas with the specific objective of studying, admiring, and enjoying the scenery and its wild plants and animals, as well as any existing cultural manifestations (both past and present) found in these areas"</i>
Conservation International, Ziffer, 1989	<i>"A form of tourism inspired primarily by the natural history of an area, including its indigenous cultures. The ecotourist visits relatively undeveloped areas in the spirit of appreciation, participation and sensitivity. The ecotourist practices a non-consumptive use of wildlife and natural resources and contributes to the visited areas through labour or financial means aimed at directly benefiting the conservation of the site and the economic well-being of the local residents"</i>
TIES, 1990	<i>"Responsible travel to natural areas that conserves the environment and improves the well-being of local people"</i>
Fennell, 1999	<i>"A sustainable form of natural resource-based tourism that focuses primarily on experiencing and learning about nature, and which is ethically managed to be low-impact, and locally oriented (control, benefits, and scale). It typically occurs in natural areas, and should contribute to the conservation or preservation of such area"</i>
Weaver, 2001	<i>"Ecotourism is a form of tourism that fosters learning experiences and appreciation of the natural environment, or some component thereof, within its associated cultural context"</i>
Fennell, 2002	<i>"An intrinsic, participatory and learning-based experience which is focused principally on the natural history of a region, along with other associated features of the man – land nexus. Its aim is to develop sustainability (conservation and human well-being) through ethically based behaviour, programmes and models of tourism development which do not intentionally stress living and non-living elements of the environments in which it occurs"</i>
Hall and Page, 2006	<p><i>"Any form of tourism development which is regarded as environmentally friendly and has the capacity to act as a branding mechanism for some forms of tourist products"</i></p> <p><i>"Green' or 'nature-based' tourism which is essentially a form of special interest tourism and refers to a specific market segment and the products are generated for that segment"</i></p> <p><i>"A form of nature-based tourism that involves education and interpretation of the natural environment and is managed to be ecologically and culturally sustainable"</i></p>
Honey, 2008	<i>"Ecotourism is to travel to fragile, pristine, and usually protected areas that strive to be a low impact and (often) small scale. It helps educate the traveller, provides funds for conservation, directly benefits the economic development and political empowerment of local communities, and fosters respect for different cultures and for human rights"</i>

Hence, theoretical debates by various authors generally include the 'natural' component, yet, not all natural tourism or nature-based tourism is ecotourism (Buckley 2000; Weaver 2001). In agreement with The International Ecotourism Society TIES, tourism activity to be defined as ecotourism has to meet certain criteria, such as:

#### **Ecotourism criteria based on TIES Principles of Ecotourism (2016)**

- Keep to a minimum physical, social, behavioural, and psychological impacts
- Create environmental and cultural awareness among all stakeholders
- Provide financial benefits for conservation programmes
- Produce financial benefits for both local people and private industry.
- Introduce educational and learning activities for ecotourists to generate awareness towards the impact that ecotourism can have in host countries
- Design, ecotourism ventures with sustainable and environmental friendly material, native of the region
- Be aware of rights and respect spiritual beliefs of the Indigenous Peoples living in the region
- Meaningful community participation, such as and partnerships to generate indigenous empowerment

Therefore, ecotourism is seen as one of the most successful alternatives to reconnect with indigenous and local people with natural areas often, people who seek to develop this activity are not only looking for financial purposes, many want it both ways, vicinities that have developed ecotourism to connect or reconnect with their natural surroundings. In the case of indigenous peoples, concerns often related to claims over their ancestral lands, many times causing conflicts by appropriating protective areas, thus, in some cases ecotourism also becomes and strategy for endurance and survival.

#### **2.4.2 International Commitments and Milestones related to Sustainable Development and Ecotourism**

Ever since the term sustainable tourism has been used, the main emphasis has been on greening the tourism industry, yet, with the appearance and popularity of the term ecotourism, the reduction of other negative impacts such as social and environmental, have become a fundamental focus within the industry. It has been recognised by international legislation and policy statements that ecotourism should employ sustainability principles (IIED, 2002; UNEP and WTO, 2006). Thus, understanding the similarities among these terms, it has been debated by many development organisations and agencies that ecotourism should include the achievement of sustainable development into the evolving industry that is tourism, this has been done by the creation of numerous international declarations and commitments related to both sustainable development and ecotourism, most of them have been and advocated by United Nations institutions and created with the assistance of the heads of member states. For instance, the role of sustainable tourism increases its participation in 1992 at the Earth Summit or the United Nations Conference on Environmental and Development UNCED, which focused on the introduction of 'non-binding' strategies, policies and plans for sustainable development (Carruthers, 2005). Hence, in 1999, the UN General Assembly introduced the seventh session of the UN Commission on Sustainable Development (CSD-7), which advocated to heads of the member states to move forwards with the development of sustainable tourism (and ecotourism). The CSD-7 was created to follow up with the aims of the UNCED has created an especial focus for the introduction of new strategies, policies and plans applied to sustainable tourism to set strategies for tourism stakeholders, and for local and indigenous communities to create partnership that can benefit them all. The CSD-7 clauses emphasised in using tourism to enhance public awareness through education and training; assistance for SMEs; and the use of various mechanisms such as non-binding agreements (UN,n.d.b) in accordance with the *Agenda 21 for the Travel and Tourism Industry: Towards Environmentally Sustainable Tourism*, a plan for global action, followed and employed by stakeholders of the tourism industry, that emphasised the need to make all travel and tourism businesses sustainable and detailed priority areas and objectives for governments and the travel industry to comport with



Agenda 21 (UNEP, 2003; UNWTO n.d.; UNEP and WTO, 2005).

Hence, with the constant growth of tourism, the demand for its products and services became a great concern for tourism and sustainability experts, consequently, the General Assembly of the World Tourism Organization adopted as a voluntary pledge the Global Code of Ethics for Tourism GCET in 1999, to use the code as a reference for responsible and sustainable tourism for all the stakeholders of the tourism industry (e.g. governments, the private sector, local communities, etc.). The GCET contains 10 principles related to the sustainable development of tourism (the codes principles include social, cultural, economic and environmental components). For example, Article 3 establishes that tourism should be a factor for sustainable development; Article 5 manifests that tourism should be beneficial for host countries and communities; and Article 6 states the obligations of stakeholders within the development of tourism (WTO, 1999). Through major international summits, sustainable tourism and ecotourism have reached important agreement in recent years, but perhaps, the role of ecotourism arose even more in 2002, with the International Year of Ecotourism IYE, a whole year dedicated to the awareness and importance of ecotourism practices and its role to achieve sustainable development (UNWTO, 2002). The World Ecotourism Summit also known as the Quebec Summit, was the central event of the IYE, the summit was the conclusion of 18 preparatory meetings among over 3,000 participants, representatives of national and local government, private ecotourism enterprises, environmentalists, NGOs, trade organisations and also local and indigenous communities. These meetings highlighted themes related to the achievement of sustainable development such as policy and planning, regulation, product development, and monitoring costs and benefits of ecotourism (UN, 2016b). As a result of the Quebec Summit, the Quebec Declaration on Ecotourism was launched, containing recommendations and guidelines for all stakeholders of the tourism industry (e.g. governments NGOs, the private sector, development agencies, research institutions, indigenous and local communities, etc.) implementing a framework referred (in part) to the World Summit on Sustainable Development WSSD, to promote the sustainable development principles, and ensure that these are utterly integrated into the tourism activity, clarifying that sustainable tourism and any other type of nature tourism must incorporate participatory tools (i.e. operations and alternative activities) to be recognised as ecotourism (UNEP and WTO, 2002). These principles contemplate social, economic and environmental impacts of the tourism industry to procure the

development of ecotourism (UNEP, 2003 and WTO, 2002b). The Quebec Declaration on Ecotourism prioritises the inclusion of sustainable development approaches among tourism and ecotourism activities, and advocates that such trend continues in the future.

As the relationship between sustainable development and sustainable tourism (and ecotourism) started to be recognised due to the similarity of their objectives, so did the relationship between poverty and environmental degradation (Denman, 2004) as a result the UN World Summit on Sustainable Development WSSD (reviewed in section 2.2.1 Indigenous Commitments and Indigenous Milestones) in Johannesburg (2002), also contains sections suggesting that tourism and ecotourism can be an important role in poverty reduction and the achievement of sustainable development. Thus, the Plan of Implementation states the urgency to promote sustainable development and ecotourism in multiple sections, with the aim to protect and manage the cultural and natural resources base of economic and social development. For instance, Article 43 exhorts the use of non-consumptive actions, and ecotourism to increase benefits in host communities. Furthermore, it also stresses the need for international cooperation; for developing programmes to encourage people to participate in ecotourism; for technical assistance, to support the development of sustainable businesses; and the need to promote the diversification of economic activities especially SMEs (Page n.d.); among other actions.

In 2012, heads of states and government representatives endorsed the Future We Want, an outcome document of United Nations Conference on Sustainable Development UNCSD (Rio+20), sustainable tourism and ecotourism were one of the two main subjects of the conference, the document in its paragraph 131 highlights that sustainable tourism practices can result in great contributions to the three pillars of sustainable development, given its linkages to different sectors, and its tendency to generate employment and possibilities for trading. The same paragraph states that representatives of the states acknowledge the urgency for the creation of ecotourism-related activities especially related to "capacity-building and environmental awareness." In addition, paragraph 131 endorses the "investment in sustainable tourism, including ecotourism and cultural tourism" to generate local initiatives and business for marginalised groups e.g. indigenous peoples, and the

poor (UN, 2016c). Also, it highlights the need for new legislation and national policies required to support sustainable tourism to achieve sustainable development.

Additionally, there are two major commitments that acknowledge sustainable tourism and ecotourism as a tool to achieve sustainable development principles including social, economic and environmental issues; the MDGs and the SDGs. The MDGs were adopted by leaders of states at the Millennium Summit in 2000; in regard to sustainable tourism, some of this goals advocated that all tourism stakeholders (e.g. governments, NGOs, and the private sector) recognise the need for the sustainable use of the nature and other resources in which the communities depend on (Loewe, 2012; Bricker et al, 2013). Moreover, as reported by ILO (2011) and the UNWTO (2016a), it could be debated that ecotourism has contributed to the MDGs particularly within the following objectives.

**Figure 4. Participation of Ecotourism in the Millennium Development Goals**

<b>Goal 1:</b> Employment and poverty reduction; local recruitment, local business investment and local supply purchase and fair-trade.
<b>Goal 3:</b> Gender equality and women empowerment, through employment, workshops, technical training, craft learning, et cetera.
<b>Goal 7:</b> Compliance to advance norms and standards, renewable energies, recycling and eco-materials, wildlife and ecosystem preservation actions.
<b>Goal 8:</b> Cooperation among UN organisations, public and private sectors, and other participants to give resources and assist governments and host communities, through (eco) tourism development and growth.

Source: adapted from UNWTO, 2016a

The MDGs were very innovative and resourceful towards the achievement of many global agreements on sustainable development, yet, its period ended with the year 2015, and although some substantial progress was made, not all goals were accomplishing (Bricker et al, 2013). As a result, the ambitious 2030 Agenda for Sustainable Development was launched during the seventh session of the UN Assembly, along with 17 SDGs, nine goals more than the MDGs (see figure below).

**Figure 5. The Sustainable Development Goals**



Source: UN, 2015

The SDGs seek to follow on the achievements of the MDGs and to conclude what they did not fulfil. Three of the seventeen goals feature the importance of sustainable tourism and ecotourism (see list in the figure below).

**Figure 6. Sustainable Tourism and Ecotourism in the SDGs**

**Goal 8: Decent work and economic growth:** promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all. **Target 8.9** "By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products".

**Goal 12: Responsible consumption and production:** ensure sustainable Consumption and Production patterns. **Target 12.b** of Goal 12, "Develop and implement tools to monitor sustainable development impacts for sustainable tourism which creates jobs, promotes local culture and products"..

**Goal 14: Life below water:** conserve and sustainably use the oceans, seas and marine resources for sustainable development. **Target 14.7:** "by 2030 increase the economic benefits of SIDS and LCDs from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism."

Source: adapted from UNDP, 2016

Nevertheless, as sustainable tourism and ecotourism hold the principles of sustainable development regarding social, economic and environmental issues, it can be contended that at least three more goals could also be assisted if not accomplished through sustainable tourism and ecotourism: (1) poverty reduction, (5) gender equality, and (13) climate change. Consequently, the MDGs and the SDGs are specifically linked to sustainable tourism, equity, and local development. In the context of ecotourism, United Nations World Tourism Organization (UNWTO) has acknowledged that due to its increasing growth in developing countries and given the potential social, economic and environmental impacts of this growth, it can be argued that ecotourism had an important participation towards the achievement of the MDGs (Bricker, 2015) and can also be the successors, of the SDGs.

Furthermore, the implementation of sustainable tourism and ecotourism has the capability to help in matters such as improving access to education, empowering women, protecting the environment, enhancing health and livelihoods of local communities and reducing poverty (Brick, et al. 2013; Fennell, 2015).

**Figure 7. Other International Commitments and Milestones related to Sustainable Development and Sustainable Tourism and Ecotourism**

The World Tourism Day (1980)
Manila Declaration on World Tourism (1980)
Acapulco Document (1982)
Tourism Bill of Rights and Tourist Code (1985)
Malé Declaration on Sustainable Tourism Development (1997)
Berlin Declaration on Biological Diversity and Tourism (1997)
The United Nations Year for Cultural Heritage (2002)
First International Conference on Climate Change and Tourism (2003)
Convention on Biological Diversity, Guidelines on Biodiversity and Tourism Development (2003)
Muscat Declaration on Build Environments for Sustainable Tourism (2005)
Global Sustainable Criteria (2008)
Roadmap for Recovery (2009)

Source: author's elaboration

### **2.4.3 Review of Existing Case Studies on Indigenous Peoples, Tourism and Ecotourism**

Current literature, backed by recent policy studies carried out by the World Bank and other development agencies, suggests that indigenous peoples can become part of their own sustainable development, by gaining recognition and authority over their own natural resources, and by developing opportunities for participation in self-led and self-governed development projects that are ecologically, socially and economically sustainable. While such efforts are still regrettably embryonic, early indications demonstrate a certain optimism (see table 2). The role and potential contribution of the field of tourism, with poverty reduction and ecotourism in particular, however, has only begun to be asked in the research.

Moreover, existing case studies and previous work with poor and indigenous peoples have also identified a handful of reasons which support the idea that sustainable tourism and ecotourism can be remarkably useful to achieve the poverty reduction and development goals before and after these where in the 'heart of the agenda' some case are Colvin, 1994; Wesche, 1996; Armesto et al., 2001; Notzke, 2004; Eplerwood International, 2005; Zeppel 2006; Hawkins and Mann, 2007; Scheyvens, 2007, 2011; Van der Duim, 2008; Goodwin, 2008, 2009; Taylor, 2008; Harrison and Schipani, 2009; Brown et al., 2011; Saarinen, 2011; Hall and Patrinos, 2012; Hummer and Van der Duim, 2012; Turner et al 2012; Bricker et al., 2013; Grieves et al., 2014, among many others.

**Table 2. Review of Existent Case Studies on Indigenous Peoples, Tourism and Ecotourism**

Author/Article	Issues discussed	Points made or raised	Main methods
<b>Ashley and Roe (1998)</b> Enhancing Community Involvement in Wildlife Tourism: Issues and Challenges IIED Wildlife and Development Series No. 11. International Institute for Environment and Development, London.	<p>Limitations and lack of participation in poor and the rural communities involved in tourism</p> <p>Leakages, lack of linkages, lack of control, exploitation financial benefits for a few, competition and conflict, Loss of natural resources, cultural disruption.</p>	<p>Tourism may not be always good for communities</p> <p>Develop tourism in appropriated ways for the community's takes time and effort (planning).</p> <p>Improve the roles and skills of all stakeholders</p> <p>Market power: combining the economic development and opportunities that tourism brings with social development issues.</p>	<p>Practical examples, case studies</p> <p>Analysis, reviews, discussions within the content.</p>
<b>Colvin (1994)</b> Capirona: A model of indigenous ecotourism. Journal of Sustainable Tourism 2,174–177	<p>An analysis of an ecotourism programme, which is initiated, operated and fully controlled by an indigenous community.</p> <p>Cultural authenticity</p> <p>Capirona and other indigenous communities have problems with oil teams.</p>	<p>Ecotourism will not work in all places.</p> <p>There must be a diversification of sustainable activities where local people are involved and participate fully and gain equitable benefits.</p> <p>Whether some claim cultural authenticity issues, others claim that ecotourism is helping to maintain the traditions</p> <p>After Capirona there was a growth interest in ecotourism in other indigenous communities of Ecuador.</p> <p>The project brought income to the community and control over who visited the forest.</p>	<p>Case study of Capirona, Ecuador.</p>
<b>Hinch (2004)</b> Indigenous peoples and tourism. In: Lew, A.L., Hall, C.M. and Williams, A.M. (eds) A Companion to Tourism. Blackwell, Malden, MA, USA, pp. 246–257.	<p>An examination of the key challenges associated with indigenous people and tourism:</p> <p>Indigenous territories (land claims), intellectual property rights, commodification of indigenous culture and self-determination.</p>	<p>The unique relationship between indigenous people and the land.</p> <p>It has been small progress for indigenous peoples in terms of the recognition of legal title over traditional lands decision-makers need to have better understanding of the dynamic of tourism development in the connect to plot a most preferable course for indigenous people.</p> <p>The challenge is to translate the objectives into practice.</p>	<p>Secondary data, reviews of articles and case studies on the field of indigenous tourism.</p>



Author/Article	Issues discussed	Points made or raised	Main methods
<b>International Fund for Agricultural Development IFAD (2003)</b> Indigenous Peoples and Sustainable Development: Discussion Paper. Roundtable Discussion Paper for the 25th Anniversary Session of IFAD's Governing Council. IFAD, Rome. <a href="http://www.ifad.org/gbdocs/gc/26/e/ip.pdf">http://www.ifad.org/gbdocs/gc/26/e/ip.pdf</a>	The need to enhance the resilience of the poor by reducing their marginalization and vulnerability. Indigenous rights; basic human rights to food, health, education, culture, dignity and peace. Secure access to land, forests and water.	The majority of the indigenous are poor. Although much progress has been made in the context of indigenous peoples for rural poverty reduction, and sustainable development; much remains to be done. Building on past experience, IFAD is committed to investing more in support of indigenous people. The ending of their marginalization would help to promote the stability needed to foster sustainable development.	Review of case studies in developing countries in Asia and Latin America
<b>Greathouse-Amador (2005)</b> Tourism: A Facilitator of Social Awareness in an Indigenous Mexican Community? The Policy Studies Organization. Volume 22, Number 5 2005	Examines the contradictions in tourism, identifying those economic spaces where indigenous have been successful in renegotiating their position with dominant mestizo group in their community.	Important factors for raising awareness in issues related to social justice among indigenous and mestizo people: NGOs, Radio and Tourism. Tourism development has: create social institutions and organizations; been a catalyst for renewal of cultural and regional pride; encouraged the maintenance and revitalization art and crafts; created infrastructure; and promoting understanding and awareness among the people of Cuetzalan.	Case study of Cuetzalan, Puebla, Mexico
<b>Notzke (2004).</b> Indigenous Tourism Development in Southern Alberta, Canada: Tentative Engagement. Journal of Sustainable Tourism. Vol. 12, No.1, 2004	A review of aboriginal tourism, as an evolving sector of the tourism industry and an important growth sector in aboriginal economies, and examines the optimism expressed about its growth potential. Travel intermediaries (partnerships), Challenges for hosts, Challenges for travel trade, Market-related challenges, Management implications.	Suggestions are made for the professional development of an aboriginal tourism product; market reconnaissance and market development; and the evolution of a partnership between aboriginal tourism product suppliers and the travel trade.  Lack of industry knowledge on the part of local aboriginal operators, lack of consumer awareness on the part of travellers and an underutilisation of potentially advantageous partnerships between local product suppliers and tour operators.	Case studies, ethnographic observation, participant observation, interviews, structured interviews and questionnaire in Alberta, Canada.

Author/Article	Issues discussed	Points made or raised	Main methods
<b>Notzke (2006)</b> The Stranger, the Native and the Land: Perspectives on Indigenous Tourism. Captus University Press, North York, Ontario.	Reviews indigenous tourism and economies, visitor markets for indigenous tourism, cultural issues in tourism, protected areas, indigenous ecotourism and CBT.	The CBT-style empowerment does not guarantee development. Overestimate the demand for culture-based indigenous tourism. Underestimate the role of nature in ecotourism.	Case studies from Canada, Belize and Ecuador.
<b>Page, S. and Dowling, R.K. (2002)</b> Community-based ecotourism: Management and development issues. In: Ecotourism. Pearson Education, Harlow, UK, pp. 244–247.	Ecotourism opportunities for sustainable development Local community needs, life style and activities. Active local participation in the planning process in operations management.	Local participation in the planning process is essential in order to achieve the conservation and sustainable development goals of ecotourism. As a result, local communities have been encouraged to set up their own ecotourism projects. The ecotourism projects are mostly initiated by NGO's and companies outside the destination area. CBE offers prospect for communities to be actively involved rather than observers.	Case studies from Capirona, Ecuador by Drumm (1998) and Colvin (1994)
<b>Ryan and Aicken,(eds) (2005)</b> Indigenous Tourism: The Commodification and Management of Culture. Elsevier, Oxford, UK.	Argues that ethnic cultures need to be managed, given the common situation of limited resources in indigenous communities. Commoditisation of culture due to the economic benefits gained through tourism.	The author raises questions concerning the future of the younger indigenous generation that is growing up in an urban context. How they cope with an urbanized life without losing their identities? How they gain economic benefits by utilizing their traditional cultural products? Important issues remain to be further explored.	Reflective articles. Case studies from: Australia, Bostwana, Canada, China, Indonesia, Sweden, the US and New Zealand.

Author/Article	Issues discussed	Points made or raised	Main methods
<b>Schaller (1996)</b> Indigenous Ecotourism and Sustainable Development: The case of Rio Blanco, Ecuador. MA Thesis, University of Minnesota. Educational Web Adventures. <a href="http://www.eduweb.com/schaller">http://www.eduweb.com/schaller</a>	Consequences of ecotourism development to its potential. Sustainable development, as means for forest conservation and as mode of intercultural communication. The struggle for land tenure. Accuracy of the ecotourism experience. Authenticity of ecotourism experience. The benefits and costs of ecotourism development.	Rio Blanco's ecotourism project as sustainable, appropriate development at the time appeared strong. The respondents indicated that they saw connection between tourism development and forest conservation. Results showed that linkages were evolving. It was unknown by the time how tourism would affect agricultural activity.	Case studies, interviews conducted With Quichuas and tourists in Rio Blanco, Ecuador.
<b>Scheyvens (1999)</b> Ecotourism and empowerment of local communities. Tourism Management 20, 245-249	How ecotourism ventures impact on the lives of people living in and around it. Benefits and costs of economic, psychological, social and political empowerment.	The empowerment framework emphasises the importance of local communities having control over, and sharing in the benefits of, ecotourism initiatives in the area. The framework could be applied in both western and developing country context.	Empowerment framework. Four levels of empowerment were utilized: psychological, social, political and economic based on Friedman (1992) Examples of case studies from Africa, Belize, and New Zealand.
<b>Scheyvens (2000)</b> Promoting Women's Empowerment Through Involvement in Ecotourism: Experiences from the Third World.	This paper discusses ecotourism initiatives from the perspective of local populations in third world countries and specifically considering whether or not women have any control over ecotourism development or are sharing equitability in the benefits which ecotourism brings. Women's involvement in ecotourism.	Community involvement in ecotourism in third world countries is not a gender neutral activity. Three reasons why gender issues should be work out: To ensure that decisions about ecotourism development are made by bodies reflecting the interest of diverse groups of community members, and that these groups genuinely are sharing the benefits of development. To ensue good nature resource management which protects the key resource upon which ecotourism is based. To ensure that ecotourism development benefits from the skills & knowledge of a broad range of community members.	Empowerment framework. Four levels of empowerment were utilized: psychological, social, political and economic based on Friedman (1992) Examples of case studies from Asia, Africa and Latin America.

Author/Article	Issues discussed	Points made or raised	Main methods
<b>Scheyvens (2002)</b> Tourism for Development: Empowering Communities, Pearson Education, Harlow, ISBN 0 130 26438 5, 2002.	Discusses ways in which tourism can provide a sustainable livelihood option to local communities and their environments, as a balance to the increasing literature that stresses how tourism disempowers, disrupts, disturbs and disenfranchises third world countries.	Awareness of the challenges faced by the communities who have tourism imposed to them. A call for development to be grounded in inward-oriented objectives. Shows how positively tourism forms can be developed when all stakeholders have a mutual interest in achieving success.	Explores five specific forms of tourism: Case studies from Africa, New Zealand and Belize. No chapter on Indigenous tourism.
<b>Valcuende del Rio, Murtagh, and Rummenhoeller (2012)</b> Turismo y poblaciones indígenas: espacios, tiempos y recursos. Scripta Nova. Revista Electrónica de Geografía y Ciencias Sociales. [Online]. Barcelona: Universidad de Barcelona, 10 de agosto de 2012, vol. XVI, no 410. < <a href="http://www.ub.es/geocrit/sn/sn-410.htm">http://www.ub.es/geocrit/sn/sn-410.htm</a> >.	Whether the type of tourism (e.g. alternative, mass or ecotourism) represents a threat to the communities insisting, in turn, in that tourism is not so much an automatic adaptation of the market, as a translation which acquires singularities according to local specificities.	Tourism is a reality in Madre de Dios, Peru, and begins to become an expectation for other indigenous sector particularly linked with urban settings. Tourism still being an unconnected and imposed reality for most people that is not involved within the tourism industry, even though it is a central part to understand their identity in a new context in which time, space and resources assume a new significance in terms of value, the price which, until now, only a few can achieve profits.	Ethnographic methodology multifocal based on participant direct observation in indigenous communities of Peru. Research was done in several stages, last stage was in 2010. Mostly informal interviews Open end questions
<b>Wesche (1996)</b> Developed country environmentalism and indigenous community controlled ecotourism in the Ecuadorian Amazon. Geographische Zeitschrift 3/4, 157–198.	This article traces and discusses the links between indigenous community ecotourism (ICE) movement in the less developed countries (LDC) and developed countries (DC) based in environmentalism. From ecotourism to indigenous controlled tourism. Linking conservation, indigenous people and ecotourism. Ecotourism and protected areas.	Illustrates how ICE in the Nororiente arose out of a juncture in space and time, of three processes: The spread of increasingly progressive DC based ecotourism into this remote LCD wilderness periphery; The growing and challenging involvement of the DC Conservation community and its Ecuadorian affiliates in the conservation of this periphery; The quest of marginalised indigenous minorities in this periphery for land rights and survival strategies in the era of globalization.	Mainly based on the model of Butler (1980). Case study build on the author's survey of the ecotourism industry in Ecuadorian Nororiente in 1992; North America and Germany in 1996.

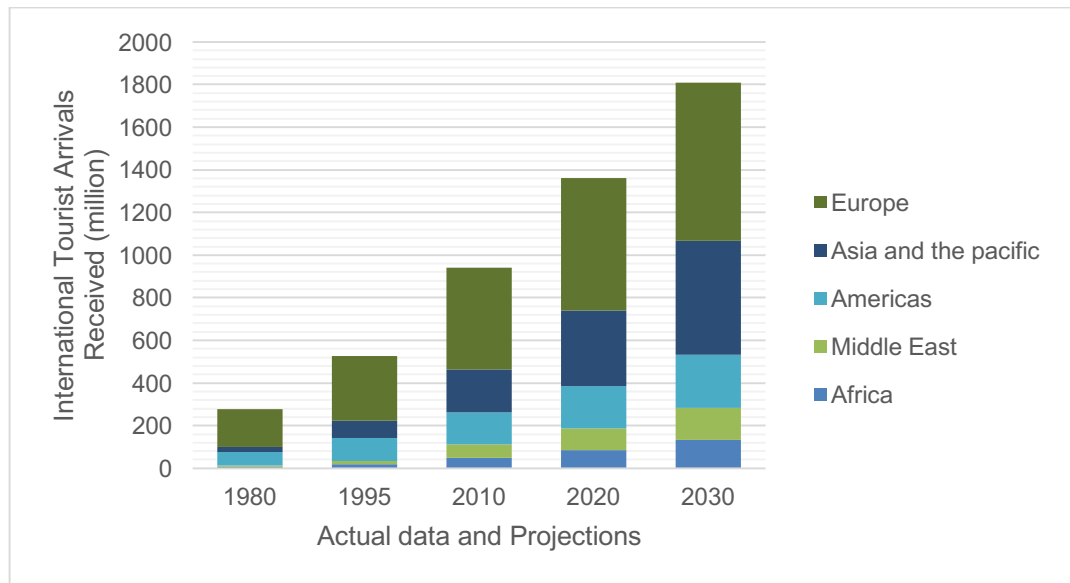
## **2.5 Ecotourism and its Relationship with Indigenous Peoples**

### **2.5.1 Contribution of Ecotourism**

Ecotourism is known as the fastest growing sector in the tourism industry; it is usually considered to be a good investment and business (Carter, 1994 in Carter and Lowman, 1994; Ashley, and Roe, 1998; Fennell, 2003). Although debates continue regarding the social, economic and the environmental benefits that ecotourism brings to indigenous peoples (Ashley, and Roe, 1998; Eplerwood, 1998; Hinch, 2004; Greathouse-Amador, 2005), there is also research suggesting that ecotourism may be a viable source for sustainable development in regions with few other options (DEVCO and UNWTO, 2013). Furthermore, developing countries strongly believe that ecotourism can perhaps be the most practical mechanism to assist in addressing underdevelopment challenges in indigenous peoples' communities where they suffer from poverty, social exclusion and other problems that endanger the environment. While many studies demonstrate that ecotourism can make a useful contribution to economic and sustainable development if planned and developed properly, it is no panacea for economic development and growth (Ashley and Roe, 1998; Colvin, 1994; fennel 2003; Goodwin et al., 2004; Hall, 2007; Elperwood 1998; Simpson, 2008; Coria and Calfucura, 2012).

Tourism arrivals in 2015 demonstrated a 6<sup>th</sup> consecutive year of above-average growth, up 4% as they reached a record of 1.2 billion (UNWTO, 2016). These trends are very likely to continue, with growing expansion in many countries, indeed, tourism arrivals may reach 1.8 billion by 2030. Tourism growth within each region, and its increasing importance as a market for international tourists, including emerging economies and also developing countries, are expected to have the greater rates of growth, according to UNWTO. More than half of 1.3 billion of international arrivals estimated by 2010 will visit emerging economies in Latin America, Africa, Asia and the Pacific Islands. Thus, tourism in the developing countries are likely to reach much higher growth rates than developing countries, with 55% of the market share in 2020 and 57% of the 1.8 billion international arrivals by 2030 (UNWTO, Tourism Highlights, 2015).

Figure 8. Tourism growth by region - current trend and forecast 1980-2030



Source: adapted from UNWTO, Tourism Highlights, 2015

As an increasing phenomenon in many developing countries, ecotourism has positioned itself as one of the major sources of income, local economic development and employment creation (Roe, et al., 2002; Roe, et al., 2004; ILO, 2011; OECD, UNWTO, WTO, 2013; UNWTO, 2015). For instance, tourism generates the majority of new jobs, it is the main exporter of goods and has a high potential to create competitive advantage to developing countries and less developed countries LDCs; by contributing between from 30% to 90% of the GDP, and from 50% to 90% of the exports, and employs approximately to 20% to 50% of the population (ILO, 2011). In consequence, it is understandable that developing countries are looking forward to develop more tourism destinations.

Hence, it has been stated by many practitioners on the field (Ashley and Roe, 1998; Buckley, 2003; Goodwin, et al. 2004; Goodwin, 2006; Notzke, 2006; Hall, 2007; EplerWood 2002, 2004; Fennell, 2003; Fenell and Dowling, 20003 Zeppel, 2005, 2006; Simpson, M., 2008; Coria and Calfucura, 2012) that the economic contributions of ecotourism to a developing country are significant. Ecotourism is not only acknowledged as the fastest growing tourism activity, but also one of the main economic activities in indigenous communities among

developing countries. Although there is lack of information and accurate data on the actual extent of formal or informal ecotourism, studies in this area (Ashley and Roe, 1998; Buckley, 2003; Goodwin, et al. 2004; Krüger, 2005; Goodwin, 2006; Notzke, 2006; Hall, 2007; Elperwood 2002, 2004; Zeppel, 2005, 2006; Simpson, 2008; Coria and Calfucura, 2012) suggest that income generated by ecotourism to a particular destination is high<sup>3</sup>.

Hence, it is quite likely that the economic contributions of ecotourism to country incomes are significant. Ecotourism is acknowledged not just as the fastest growing tourism activity, but also as one of the main economic activities in indigenous communities, among developing countries. As one way to track the importance of ecotourism as a currency earner for poor and indigenous communities, it is possible to examine changes in local destination levels. As an example, ecotourism was seriously developed in 1986 in Costa Rica. Shortly after that, the arrival of tourism grew seven times and local incomes increased fourteen times, leading to a significant increase in Costa Rica's economic revenue as well as a doubling of its tourism arrivals (Blaje and Chiasa, 2011 in CREST, 2013). Furthermore, in 2010, Costa Rica was already consolidated as a successful ecotourism destination, its international tourism revenue was increasing considerably; in addition, tourists in Costa Rica were spending 42% more per tourist, per visit, than in tourists, in France (CREST, 2013) which was rather unexpected given that France is a popular destination and has been in the top ten of the UNWTO tourism arrival destinations for a long time.

According to UNEP, ecotourism is a positive economic activity for developing countries, because in addition to the direct environmental and social benefits, it spreads awareness of the community's circumstances and provides an additional means of economic transfers from developed to developing countries (UNEP, 2013). However, authors may also argue that the income generated in developing countries leaks back to the developed countries, when foreign private sector interests drive and benefit from the tourism investments, in that multinational corporations owned by developed country interests become the ultimate recipient of tourism revenues. While this may be true when referring to mainstream tourism, one of the principal elements of ecotourism is that a significant portion of its revenues benefit at a local level. For example, results of the Travel Guard Survey 2013 showed that more than

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<sup>3</sup> Studies reviewed were mostly carried in specific vicinities (i.e. villages, cities), therefore it cannot be generalised by saying that ecotourism benefits the entire country.

25% of ecotourism travel was directed into local destinations economies (Travel Guard, 2013).

Table 3. International tourism receipts in developing countries (billion US\$)

Year	1990	2000	2010	Growth rate
World	262	475	928	254%
High income countries	207	336	588	184%
Developing countries	55	139	340	518%
LDCs	1.1	2.9	9.9	800%

Source: adapted from UNWTO, 2010b in UNEP, 2013

Table 3 shows that despite the growing rate of developing countries and LDCs it is much higher than in developed countries; tourism in LDCs and developing countries have a rather small share of the international tourism market. However, the estimate of those numbers does not include the value of domestic tourism. Comparatively, when referring to economic benefits of tourism, especially ecotourism in small destinations to focus exclusively in the international market would be a mistake, domestic tourism often constitutes a significant opportunity for local economic development. According to UNWTO (2013) the majority of tourists in developing countries travel within their own region.

For example, in 2012, national tourism in Mexico contributed with 86% in average within the tourism industry, meaning that 38.2 millions of tourists were international, and 83.9 million were national (SECTUR, 2012). Also, in 2007, Thailand international tourism accounted for 4.16 million and domestic in-country trips had an amazing growth of 83.23 million (TAT, 2007). These statistics demonstrates that domestic tourism may be a more secure market in developing countries given the remote location of some indigenous communities.

Another example of the contribution of domestic tourism is the project implemented by the East Africa Community integrated by Burundi, Kenya, Rwanda, Tanzania and Uganda; as indicated by the Trade Mark East Africa (2014), these countries created a strategy in which they unified the region with tourism proposes. In other words, the five partner states became one and started by targeting the ecotourism market as if



they were one single destination. Moreover, one of their main objectives has been to stimulate domestic tourism by promoting ecotourism. The reason behind this idea is that in contrast to international tourism, domestic tourism can be mapped to easily tracked and predictable seasons in many cases. Furthermore, they have included local people into an action plan where they promote ecotourism towards the destination. As a result, multiple stakeholders and community members received benefits. These benefits were not just economic, but also linked to sustainability improvements with regards to their natural surroundings and wildlife (Trade Mark East Africa, 2014).

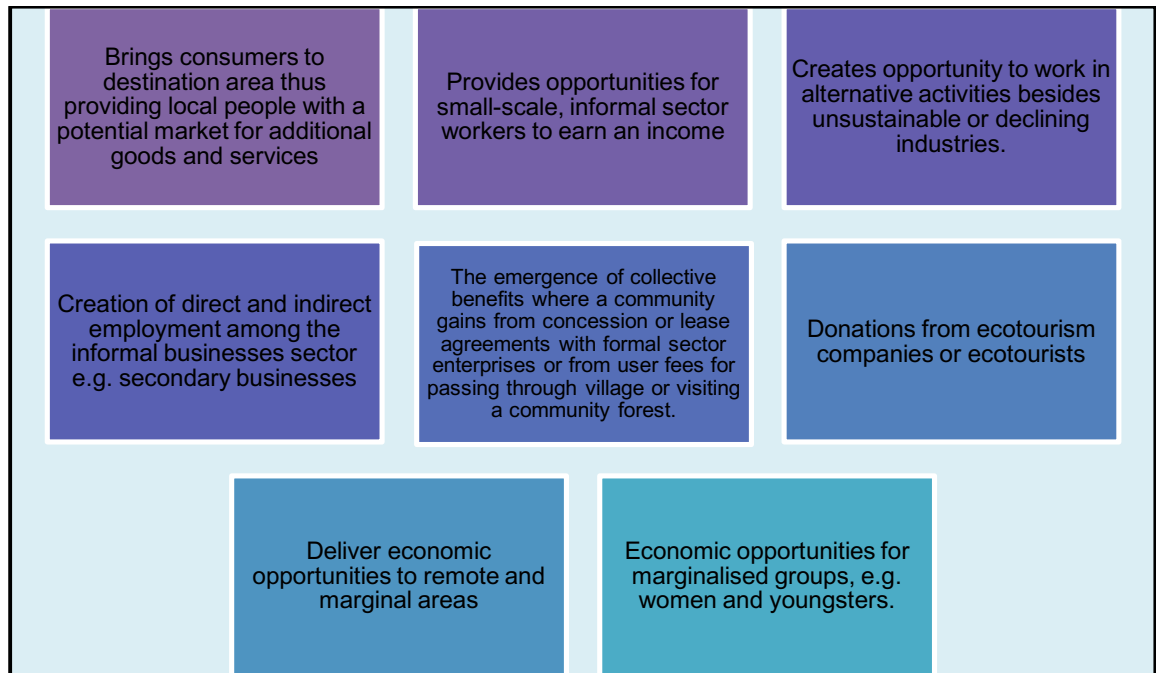
In essence, it can be demonstrated from the review of literature that ecotourism has become an important sector within the tourism market, in spite of many discussions about its actual benefits on developing countries and their indigenous populations (Ashley and Roe, 1998; EplerWood, 2002; Hall, 2007; Harrison, 2008; Coria and Calfucura, 2012). Ecotourism it is considered an important mechanism for sustainable development (Drum and More, 2002; Eplerwood, 2002, 2004; Greathouse-Amador, 2005; Zeppel, 2006; Coria and Calfucura 2012; UNWTO, 2013) in places with no other means for development. It creates results such as the empowerment of indigenous peoples, educating and stimulating eco-tourists and the local community, increasing revenues, and also ways of preserving and conserving the natural environment.

### **2.5.2 Benefits at Local Level**

Current literature in ecotourism such as case studies, journals articles and book chapters have recognised that ecotourism is not a solution to all communities problems and difficulties; that neither tourism, nor ecotourism are to be considered a panacea for economic development and growth (Colvin, 1994; Ashley and Roe, 1998; Goodwin, et al. 2004; Goodwin, 2006; Notzke, 2006; Hall, 2007; Elperwood 2002, 2004; Simpson, 2008; Coria and Calfucura, 2012; Bricker et al., 2013). However, there is also evidence that ecotourism can be an important mechanism which can contribute to sustainable development and to poverty reduction. For example, the paper by Ashley and Roe (1998), 'Enhancing Community Involvement Wildlife in Tourism: Issues and challenges' presents several advantages and mostly limitations of community involvement in ecotourism by analysing various case studies. As stated in the paper, it is not possible to conclude that ecotourism participation is always favourable for local communities but, based on the findings, it can be argued that by targeting key issues (e.g. addressing correctly the roles of stakeholders) and by carefully managing and securing the participation of NGOs, ecotourism could provide numerous benefits for the local community. As reviewed in the Pro-poor Tourism Partnership (PPTP) and the Overseas Development Institute (ODI) working papers (CRT, IIED and ODI, 2001), papers by Eplerwood International (Eplerwood, 1999, 2002, 2003, 2004, 2005), books (Carter and Lowman, 1994; Wering and Neil, 1999; Weaver, 2001; Scheyvens, 2002; Zeppel, 2006; Honey, 2008), and in case studies from Ecuador (Colvin, 1994; Ruiz et al., 2008), Mexico (Foucat, 2002; Greathouse-Amador, 2005), Canada (Notzke, 2004), Chile (Armesto et al. 2001; Herrman, 2005), Costa Rica (Driscoll, et al., 2011) and Thailand (Kontogeorgopoulos, 2005), among many others, there are strong possibilities that eco-tourism ventures, carefully planned and executed, can support sustainable development in local, rural, and indigenous communities.

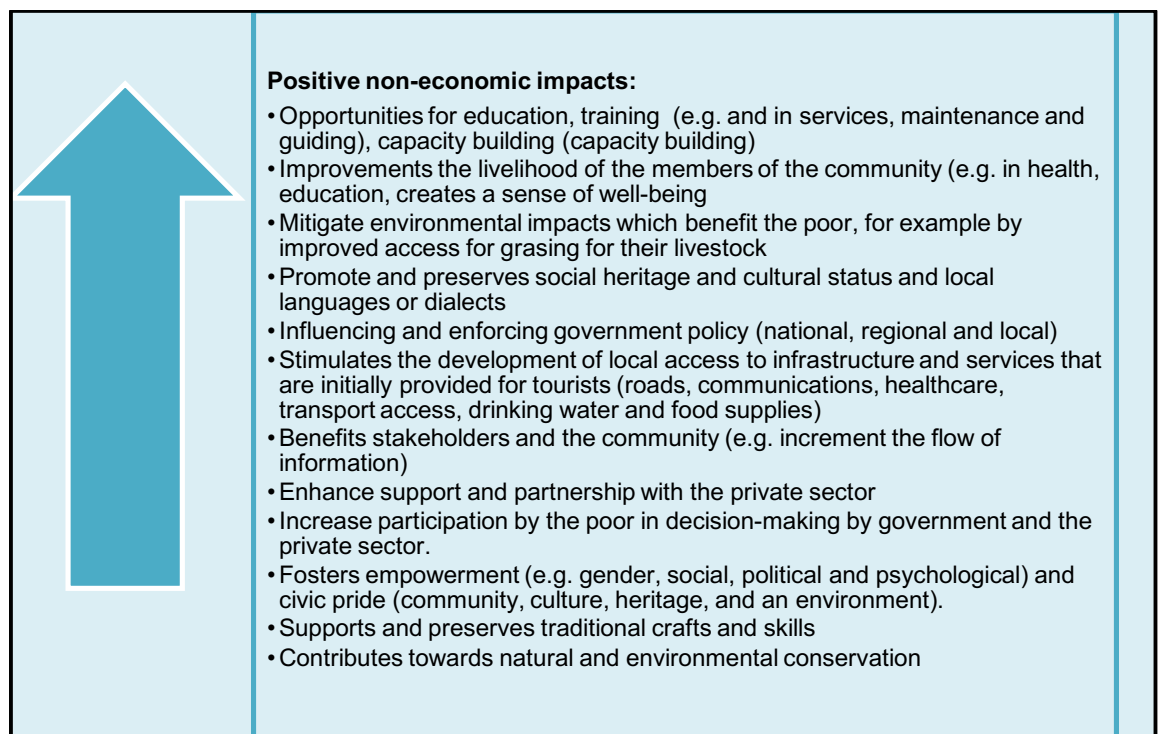
As noted in several working papers by the PPTP and ODI, the benefits that ecotourism offers to local people can be both economic and non-economic. Based on the analysis of different papers, the following benefits are the most recognised, or common among the benefits in the ecotourism-local community relationship.

Figure 9. Positive Economic Impacts



Source: adapted from Ashley and Roe, 1998; Ashley et al, 2000 and Meyer, 2011; Coria and Calfucura, 2012

Figure 10. Positive Non-Economic Impacts



Source: adapted from Ashley and Roe, 1998; Parker, 1999; Zeppel, 2006; Simpson, 2008; Ashley et al., 2000; Meyer, 2011; Simpson, 2008; Coria and Calfucura 2012; Wearing and Neil, 2009

Equally, as multiple evidence found in many ecotourism case studies suggests, practices within indigenous ecotourism ventures in different countries of the world bring positive and negative impacts (Eplerwood 2002, 2004; Zeppel, 2006; Coria and Calfucura, 2012;). There is always a potential risk when developing ecotourism or any other kind of tourism; as many researchers have observed, ecotourism, if not developed properly, can in some cases take on an exploitative nature that could lead to negative impacts in the natural environment and the rest of the community. For example, in one case, ecotourism was perceived to have led to community displacement (Gumbo, 2010 in UNEP, 2013).

#### **Box 2. Displacement among the Maasai People**

The Masaai peoples in Kenya and Tanzania experienced a negative side of ecotourism, particularly within indigenous peoples that live in the wild. The principles of ecotourism call to the need of protecting nature as well as indigenous peoples' environments, meaning that, in many circumstances many wild destinations in different places are set to be men free. In other words, without the disruption and exploitation that human interaction brings to those places. This is a big step for the conservation and preservation of wildlife. However, the Masaai indigenous peoples from Kenya and Tanzania rely on their natural resources for their survival. After a long flight against British colonizers who kept on displacing entire local communities from the national parks, the creation of national parks, keeps on happening without the acknowledgement or considerations from the Maasai Peoples. There is a win towards wildlife preservation, however; Maasai people rely on wildlife for their survival. The problems continue to increase as national parks continue to generate. Therefore, if displacement is necessary, government should assist local communities within the process by creating support programs and allow them to participate in decision-making. (Narimatsu, n.d.).

On the positive side, empirical evidence to date suggests that negative impacts can be avoided in many ways, and that many benefits can be achieved, outweighing the challenges, when an ecotourism project proves to be successful per se.

While most ecotourism ventures are quite small, it is important to note that these projects are often supported by conservationists and that their income-generation practices support the protection rather than degradation of the natural environment, preserving it for many more multiple uses, and for re-investment, and reducing the costs of clean-up and recovery. In addition, in some cases if revenues stay within the local community, this could create a 'ripple effect' that may lead to the generation of further benefits such as health, improved nutrition, better quality water and better education (just to highlight certain benefits linked directly to the various 2015 SDGs), improving indigenous peoples well-being in a situation that is currently characterised by social exclusion and poverty. Therefore, ecotourism has become an increasing demand, particularly in the developing world.

### **2.5.3 Advantages in Delivering Growth to Reduce Poverty**

Ever since the term was first coined, ecotourism has been seen as an important tool for economic, and social growth in developing countries with a high percentage of biodiversity (Viljoen, 2011 in UNEP, 2013). Moreover, ecotourism normally takes place in small community projects and local activities that do not have significant impacts, but rather, support the protection of the natural environment (Seon-il, K. et al. 2013; UNEP, 2013). Therefore, what it offers is a match to the needs of indigenous communities. Unlike in other tourism sectors, ecotourism requires relatively little infrastructure for its initial development due to a comparative advantage that relies on its natural and cultural assets (WTO, 2002; Seon-il, K. et al. 2013). Consequently, in the absence of other engines of economic growth, its incorporation has proved to be a powerful engine of poverty reduction (WTO, 2002; Eplewood, 2002) in indigenous communities. However, ecotourism's potential to contribute towards poverty alleviation, still not being positively acknowledge nor sustainable used by policy-makers in developing countries (e.g. governments, NGOs or other development support agencies). As reported by the UNWTO (WTO, 2001), the entire tourism industry is mainly seen as a component of economic growth instead of a system for delivering on poverty reduction. This perception needs to change.

Also recognised by the UN's Programme on Sustainable Tourism - Eliminating Poverty (STEP): "Tourism is one of the strongest drivers of world trade and prosperity. Poverty alleviation is one of the greatest global challenges. Despite turbulent times for the world's economy, these basic facts are unlikely to change. Focusing the wealth-creating power of tourism on people most in need remains an immense task and opportunity" (UNWTO, 2011).

In fact, there are numerous case studies, which have acknowledged the potential for ecotourism to stimulate economic growth and reduce poverty among poor and indigenous peoples. For instance, in analysis carried out by Colvin (1994) on Capirona on the development of an ecotourism network among indigenous communities from the Amazon and the Napo Province in Ecuador, it is documented that analysis arose due to external factors like how travel agencies were already

taking visitors into the rainforest and the surrounding communities did not receive any benefits from it. This gave birth to the ecotourism network, in which the indigenous communities found ways to work together to deliver a very distinct experience for their international guests. As a result of a new economic source of revenues, poverty levels were reduced. As the study demonstrated, the international engagement and linkages with guests from other cultures, when carried out in a manner that respects and builds upon the dignity of the cooperating indigenous nations, fostered local empowerment when participating within the process and decision-making. Up to date the ecotourism network is still operating. Another example, as documented by Paez (2007) is the case of Oaxaca, Mexico, where a reduction of 14.89% in poverty was attributed to the intensification of ecotourism activity. Similarly, as noted in the findings of Ashley and Roe (1998), there are advantages that tourism provides for economic growth in local communities such as steady prices compared to traditional exports, job creation, spin-off enterprises, and multiplier effects that attract private investments such as economic diversification and sustainable utilisation of natural assets. Similar findings were underlined in case studies and articles such as Page, S. and Dowling 2002; Hintch, 2004; Notzke, 2004, 2006; Mitchell and Ashley, 2007; 2009; Spenceley, et al., (2009); Valcuerde del Rio et al., 2012; among many others.

While tourism generates employment and contributes remarkably to economic development, it is crucial to be aware that neither tourism nor ecotourism can provide magic solutions for poverty reduction. Indeed, the tourism industry can also cause negative impacts such as access constraints to territories and natural resources, and other negative social and cultural effects (Ashley and Roe, 1998; Scheyvens 1999; Krüger, 2005; Notrzke, 2006 Ashley and Mitchell, 2005; Elprewood 2002, 2004; Mitchell and Fall, 2008; 2002; ILO, 2011). Ecotourism wrongly developed can overshadow its capacity to reduce poverty, leading to suggestions that the industry should start to see ecotourism as it is - an engine for sustainable development, not as a global marketing tool that stands firmly within the neo-liberal paradigm and can lead to commodification of nature and poverty.

Furthermore, as noted in the working paper 289 by the Overseas Developing Institute (ODI) Mitchell and Faal (2008), the advantages of tourism in delivering pro-poor growth can be emphasised (see figure below).

Figure 11. Advantages of Tourism in Delivering Pro-poor Growth

Overall tourism is labour-intensive – although less than agriculture and therefore can impact on a large number of lives through the labour market.
Tourism has considerable potential linkage, especially with agriculture and fisheries, which can minimize the 'leakage' effect. Due to the high income elasticity of demand for international tourism, it can offer a relatively rapidly growing market.
Tourism provides opportunities for off-farm diversification, particularly in areas that do not attract other types of development options.
Tourism can provide poor countries with significant export opportunities where few other options are viable.
It may create initial demand for a good or service that can itself develop into a growth sector.
Tourism products can generate demand for assets such as, natural resources and culture, to which the poor often have access
Tourism delivers consumers to the product rather than the other way around.
Infrastructure associated with tourism development can provide essential services for local communities.

Source: adapted from Mitchell and Faal, 2008

Therefore, empirical analysis on the case studies mentioned above and many other, have identified several reasons why ecotourism can be particularly a relevant developer growth to reduce poverty.

First, the majority of the regions where ecotourism is considered essential for economic growth are within indigenous peoples in developing countries. Moreover, developing countries have the highest rates of poverty compared to the rest of the world; poor people survive under the international poverty line that is US\$1.25 to \$2.50 a day (World Bank Development Indicators, 2013). In 2013, tourism contributed with 6% of the world's exports in developing countries (UNWTO, 2013).

Second, ecotourism in the absence of other engines of economic growth among indigenous communities and areas with not many development alternatives ecotourists normally visit rural and distant destinations due to their landscapes, wildlife, natural biodiversity. Consequently, the income that ecotourism generates is of high importance in order to fight poverty (WTO, 2002; Seon-II, et al. 2013).



Third, ecotourism may provide an excellent mechanism to drive revenues from developed countries to developing countries. Its effectiveness is anticipated within the actual nature of the product itself; ecotourists travel mostly to vulnerable natural destinations and seek to respect their sustainability as part of the experience (UNEP, 2013).

Fourth, the product assets of the ecotourism sector consists of the natural areas that form part of the indigenous communities such as natural resources and wildlife biodiversity, but also in non-tangible elements such as indigenous cultures, traditions and knowledge. Consequently, it creates employment for a relatively high part of the local population, specially marginalised peoples within the communities themselves. For example, ecotourism can benefit women, un-skilled labourers, and rural residents, elder and young people and it can work together with a wide range of businesses, SMEs and even the informal sector (Eplerwood, 2002; WTO, 2002).

Fifth, ecotourism fosters the creation of new and more sustainable infrastructure. Although certain facilities may be incorporated for ecotourists only, in the end their uses are less likely to harm the surrounding environment, and provide more benefits for the local community. Some examples of infrastructure brought because of ecotourism are roads, health clinics or facilities, transport in general, communications, water and energy supply (WTO, 2002; Goodwin and Robson, 2004).

These arguments suggest that there is a convincing rationale for the potential of ecotourism in reducing poverty.

#### **2.5.4 Empowerment of Indigenous Peoples through Ecotourism**

As previously seen in this chapter, indigenous peoples are mostly vulnerable, and marginalised peoples that live in rural or remote areas of their home countries where they often suffer of inequality and lack of education, social exclusion and discrimination in many forms (Simpson, 2008; Hall and Patrinos, 2012). However, being empowerment of indigenous peoples an important of sustainable development, many attempts to support the well-being of these peoples are being implemented. However, ecotourism is known for achieving these issues.

There is a growing literature that details various means by which ecotourism can empower indigenous peoples (adapted from the Empowerment Framework in Scheyvens, 1999, 2002; UNDRIP, 2008; Simpson, 2008; UN2009; UNDESA, 2013). These are summarised below.

##### **Economic Empowerment**

Ecotourism provides alternative income that brings sustainable economic development by creating permanent earnings among the community (Scheyvens, 1999). If these earnings stay at local level, this may generate cash flow that could potentially lead to the amelioration of the community. For example, housing, creation of schools, roads, the formation of small businesses and generating further employment, enhancement of the commercial area, health improvement and the eradication of poverty. It is also worth pointing out that economic empowerment usually leads all other types of empowerment (see figure 11).

##### **Psychological Empowerment**

Ecotourism enhances indigenous peoples pride and self-esteem as a result of the outside acknowledgement of their unique culture, environment and traditional knowledge (Ashley and Roe, 1998; Scheyvens, 2002). In other words, the development of ecotourism has stimulated them to feel proud of their culture; in many cases, it has also helped to rescue or resurrect the traditions. For example,

indigenous peoples that used to feel shame due to social discrimination are now experiencing pride in wearing their traditional dresses or in teaching their children their tongues or dialects when before they were ashamed to speak it themselves outside their community. Furthermore, ecotourism is a tool created with the aim to achieve the well-being of the local community, this includes psychological empowerment and can be noted on the *Principles of Ecotourism*.

Figure 12. Ecotourism a Mechanism for Economic Development in Indigenous Communities



Source: adapted from Ashley et al., 2000; Marcleod, 1998 in Scheyvens, 2002

## Social Empowerment

Ecotourism can improve and maintain a balance within the indigenous groups, moreover it can help to integrate themselves with the rest of the community or

society that are no-indigenous creating a sense of social cohesion. Furthermore, social empowerment can be described as the most obvious achievement of ecotourism (Scheyvens,1999). Examples of social empowerment issues are educational enhancement, inclusion of women and youth into social activities, the creation of community infrastructures such as water quality improvement, health clinics, new environmental and other educational programmes, and better supply systems. Every element that contributes to poverty reduction can allow indigenous peoples to have a better life (Scheyvens, 1999, 2000; UNDESA 2013).

### **Political Empowerment**

Ecotourism can empower indigenous communities and direct the attention to their issues and interests, allow them to express their concerns and support them to act upon them. Perhaps the most evident exemplification of this by giving indigenous peoples the opportunity to participate among any ecotourism project that is being developed in the area. Furthermore, ecotourism can contribute to the empowerment of most vulnerable groups within the indigenous communities such as women, young and elder people; another way is by creating different committees that represent the community in order to get involved in decision-making or to resolve community issues (Scheyvens, 1999; Simpson, 2008). Political empowerment also includes local control, equality for women, access to resources, and the recognition on of their lands and rights (Hinch, 2004; UN, 2009).

#### **Box 3. Uluru Kata-Tjuta National Park**

The Uluru Kata-Tjuta National Park is an excellent example of empowerment in general, but it stands out due that these aboriginal peoples from Australia have achieved the ultimate goal for the rest of indigenous peoples that wish to participate within the tourism activity. These aboriginal people share the management of the park, which is rarely seen among national parks, since the government usually takes over. Joint management generates political empowerment among indigenous peoples by fostering new businesses and services within the community, recognising their lands rights, allowing them to control the resources and not just participate, but lead affairs towards decision-making. (Nintiriganyi, 2012; Cochrane, 2013).

The story is not all rosy, of course. Clearly, there are also signs of disempowerment that can be attributed to ecotourism, including the following factors:

- Small creation of revenues, sometimes these revenues will reach determinate people of the communities such as leaders, chiefs and partner agencies.
- A reduced number of people will be able to make a salary to survive meaning that just peoples with the necessary skills may be employed full-time, and others will need to have a second job to sustain their living.
- Some indigenous peoples may experience distress after interacting with visitors, sometimes they may even experience shame and develop an inferiority complex about their traditions and culture.
- In several cases is very possible that not all members get direct benefits from the ecotourism project, and this can also create distress and land ownership can become a real problem if the indigenous peoples inhabit it is considered a protected area, they are likely of being forced to move into another place.

Source: adapted from Scheyvens 1999; 2002; Coria and Calfucura, 2012

Furthermore, Notzke (2006) argues that empowerment does not necessarily ensures development by referring that in many ecotourism developments, the demand for indigenous tourism is overestimated and the participation of nature and the environment underestimated, and Scheyvens (1999; 2002), suggests that it is essential to contemplate economic results of the ecotourism activities covering the formal and informal industry to determinate if the community has been empowered. However, ecotourism gives direct benefit to the economic, social and political development in the local communities and stimulates social and human recognition. In addition, to successfully address empowerment through tourism, the support of NGO may be necessary (Zeppel, 2006). Moreover Scheyvens (1999, 2000, 2002); Sofield (2003), Spencely (2004), WTO (2005), UNDRIP (2008), Coria & Calfucura (2012) and UNDESA (2013) agree that building on indigenous peoples empowerment is investing in sustainable development.

## **2.6 Policy Context Conclusions of Relevance to this Study**

This chapter has reviewed and analysed existing literature in the context of indigenous peoples, sustainable development and ecotourism, summarizing current and ongoing international policy discussions and debates. In the chapter, the international policy context, global debates, and recent international agreements and declarations were also surveyed and briefly analysed from a tourism sector point of view, in order to understand how sustainable development is important for indigenous peoples due to their traditions, spiritual beliefs, connections with their land, and ecological balance of tourism projects. This broader policy context, particularly as it has evolved in global policy debates over time, demonstrates the importance of the research for governments such as Mexico. In its analysis of the challenges faced by indigenous peoples and their communities, through review and critique of existing academic literature in the field, the chapter identified key factors of extreme poverty, social exclusion and marginalisation, lack of economic development, disrespect for human rights and even threats to cultural survival particularly facing indigenous peoples globally and in the Americas. In its analysis of the international policy context, however, glimmers of concern and hope appear. In particular, the chapter identified a growing international consensus commitment to the development of sustainable tourism, tourism which benefits local communities in which it is based, and ecotourism to deliver on economic and environmental priorities for these communities. In essence, the chapter argues, there is a growing understanding and insistence, in international policy debates, that tourism can and should act as a mechanism for poverty reduction and ecological protection, in the interest of meeting the new global SDGs for indigenous communities of developing countries. To reach these conclusions, the chapter identified lessons learned from the literature reviewed such as examples to follow, and also gaps arising within it. Finally, the conclusion explains how the present research will address the gaps found through the literature and clarifies how it differentiates itself from preceding research that has been carried out on the issues raised.

## **CHAPTER THREE - Tourism Value Chain: Purpose and Significance towards Sustainable Development, Ecotourism, and Poverty Reduction in Developing Countries**

### **3.1 Introduction**

The field of tourism studies continue to evolve, as illustrated in the previous chapter. A key focus over the recent decades has been whether tourism can contribute to poverty reduction and under which circumstances. To contribute to the knowledge base, diverse tourism case studies continue to test new methods, adopting divergent approaches. One of the methods which is gaining recognition among the alternatives (given its framework setup) is the value chain analysis (VCA). The present chapter includes research on the relevant tourism and poverty reduction literature, mainly from digital sources such as journal articles, working papers and case studies from governmental and non-governmental organisations (NGOs). To begin, the chapter provides a conceptual overview of traditional value chains and the main actors and stakeholders, while it moves to the appearance of the so-called tourism value chain (TVC), purpose and opportunities directed to poor people. Then, it addresses how tourism value chains provide various possibilities for economic, social and sustainable development; why the use of tourism value chain approaches is gaining prominence in developing countries; and why the role of interventions is being stressed. Next, it evaluates how creating economic linkages between the tourism value chain and sharing the benefits more widely can lead to an increment in the participation of the local community and to upgrading of business, and how this contributes to the achievement of poverty reduction and ecological objectives towards more sustainable development. Finally, giving due consideration to the most common patterns and issues encountered in the literature (e.g. challenges to TVC implementation and barriers to local participation), the outcomes of existing case studies are analysed and integrated within a proposed framework typology.

### 3.2 From the Value Chain to the Tourism Value Chain

As has been widely acknowledged in tourism studies, value chains embrace: “(a) full range of activities which are required to bring a product or service from conception, through the different phases of the production delivery to final consumers, and final disposal” (Kaplinsky and Morris, 2004). In other words, a value chain links the steps of a product or service, from the producer to the consumer, adding some value in the process. Moreover, VCA is the analytical perspective of the value chain, a practical tool that identifies the connection between the different sectors of the process and the economic flow (MP4, 2008). A VCA can be developed and applied, for instance, in order to ensure the quality of the service/product and its access to the market and to verify that all the actors within the chain have fair benefits according to their work, so it also ensures the economic flows. For example, in an ecotourism project based in an indigenous community, the value chain is the process in which the product, in this case, the ecotourism service e.g. accommodation, entertainment, catering, ecotourism activities, reaches the consumer i.e. ecotourist (CI, 2008).

To define a TVCA, it is best to start by explaining the value chain analysis for tourism. Indeed, the VCA (as its own name states) is meant to be carried out as an analysis of the value chain process. As research by Kaplinski and Morris (2002) has demonstrated, there are three main circumstances in which a value chain analysis can be particularly useful:

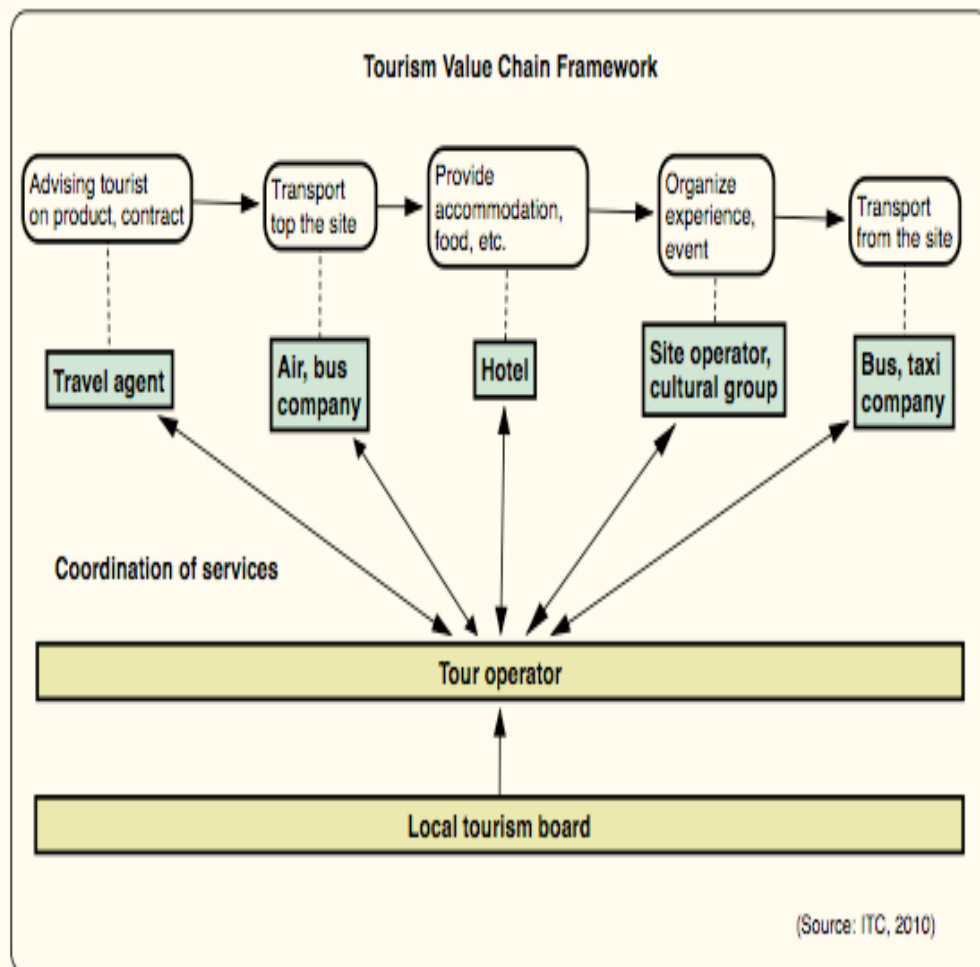
1. In a growing sector, as an analysis to check the effectiveness of the production of components in order to secure competitiveness.
2. When a new product is establishing itself in the market, as an analysis to strengthen and improve production efficiency.
3. During a time of positioning within the market, as an analysis to create opportunities for sustained income growth.

As such, the TVC as a concept has been created to reach beyond individual firms or businesses, in order to use the benefits of the value chain such as supply chains and all the distribution networks in the tourism industry (see figure 13). Furthermore, the TVC supports the tourism sector to better understand flows and



inputs, relationships, costs, opportunities and how to create revenues among the elements of the value chain (SNV, 2010).

**Figure 13. Tourism Value Chain Framework**



### **3.3 The Appearance of the Tourism Value Chain (TVC)**

Every value chain revolves around the market. For this reason, there is an equal need and opportunity to use different methods for the tourism industry to contribute towards poverty reduction. Moreover, the trend to use tourism to reduce poverty continues to grow, especially in developing countries (Eplerwood, 2004; Ashley and Mitchell, 2008; Goodwin, 2008; Mitchell and Ashley, 2009). Consequently, the integration and upgrading of various analytical methods have assisted in the development of new ones such as the TVC.

Bearing in mind that tourism per se involves a complex set of activities (e.g. cultural, entertainment) and services (e.g. food, transport, accommodation) that are not part of a tangible reality, and where its production and consumption cannot be retained and must occur within a certain place or destination (Ashley and Mitchell, 2008); the tourist becomes the market, and the destination becomes the product. While, in a conventional value chain the method used is quite different, here the product moves to the consumer, traveling from production to export nodes until reaching the final consumption (Porter, 1985; Gibbon, 2001; Kaplinsky and Morris, 2001), proving the urgency of a value chain that prioritises tourism's needs.

In this context, the TVC approach emerged from the necessity to have a chain focused exclusively on tourism elements, but also with the aim to reduce poverty and improve access to sustainable livelihoods in the destination locality (Ashley and Mitchell, 2007). In other words, this innovative method was strategically designed to be different from conventional value chains (which are mainly used as business tools) to redirect the focus onto the elements that are most important within the tourism scope. Hence, TVCs deviate from other types of chains (e.g. commodities, manufactured, agricultural) given the characteristics of the tourism product (Ashley and Mitchell, 2008; 2009).

For that reason, the TVC was developed as a market alternative use other forms of projects and interventions that could secure beneficial impacts for the destinations (Mitchell and Ashley, 2009). Thus, practitioners from international organisations such as the Pro-poor Tourism Partnership (PPTP), the Overseas Development Institute (ODI), the Dutch Development Cooperation Service (SNV), and the International Finance Corporation (IFC), were the first to develop the

concept and apply it in their work (Ashley and Mitchell, 2008). For to instance, the tourism value chain analysis has been applied to several projects mainly in Asia and Africa (Ashley and Mitchell, 2006). Thus, the TVC is considered as a spin-off of the traditional value chain which includes the integration and upgrading of pro-poor tourism approaches, embracing sustainable tourism's belief towards the achievement of sustainability and the reduction of poverty alongside the SDGs in particular Goals 8, 12 and 14 (UN, 2015). In addition, the TVCA can be used on smaller scales such as micro markets mostly in developing countries.

### **3.4 Purpose of Tourism Value Chain Approaches**

As noted above, a TVC incorporates a full range of activities in order to take tourists to their destination and provide them with all the products or services needed (Ashley and Mitchell, 2008; 2009). A tourism product or service is also denominated as an experience. In order to provide the consumer or tourist with this experience, the participation of many different actors is necessary. On that account, the tourism value chain does not begin its process by modifying an input throughout the chain, instead it is connected to a wide range of products and services, building the tourist experience along the value chain (CI, 2008).

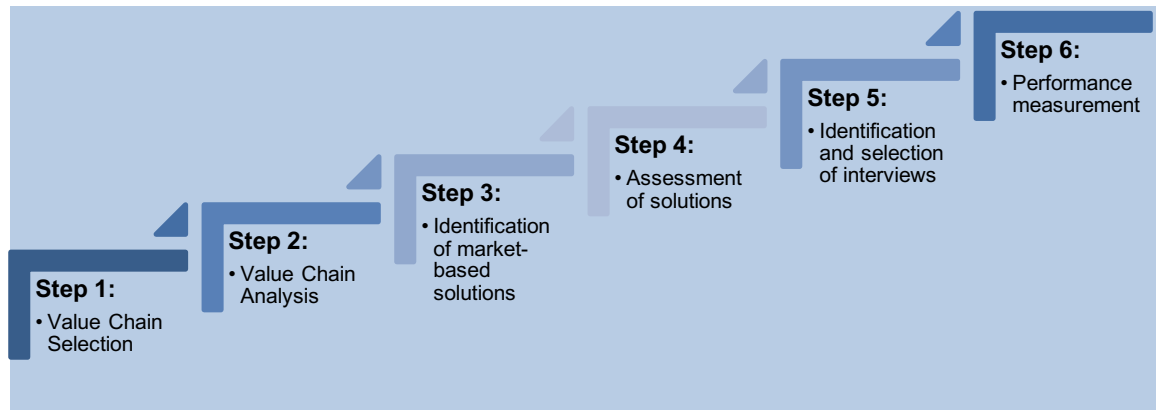
Considering that the conventional value chain approach was first incorporated for tourism with the aim to bring forward strategic planning for the development of business models and competitiveness within the industry (Kaplinsky, 2004), the tourism value chain was developed by researchers under the assumption that it is also one of the most reliable options to obtain sustainable results in order to reduce poverty; in that, it encourages the local people's participation within the market and therefore, creates economic growth (Springer-Heinze, 2007). Furthermore, the tourism value chain has two categories as starting points. First, to upgrade existing performance in order to be more competitive and to increase the revenues within the tourism sector, meaning that, mapping the TVC in a certain destination permits tracing down its economic flow, and therefore to identify all sort of actors and links along the value chain. Second, there are some TVC that focus their attention towards a specific node of the chain: the poor. Mainly used in Pro-poor Tourism (PPT) approaches to measure or at least *estimate* the poor's earnings from tourism

revenues (e.g. direct and indirect) within their destination, also known as pro-poor income (PPI) (Meyer, 2007; Ashley et al., 2009). However, it is argued that these chains tend to spin in different directions and disregard the viability of the tourism industry (Mitchell and Ashley, 2007). Hence, finding the middle point among both may be rather challenging, but necessary to create a successful tourism chain that not just increases business competitiveness in a sustainable way, but also assists poverty alleviation. Locally, as seen in investigations in Laos and Vietnam by mapping a destination (Beyer, 2014), it is possible to pinpoint the actors within the chain, in order to increase its competitiveness and identify at exactly which points the poor participate and whether there may be potential for new opportunities to either create or update the participation of poor and local actors.

The purpose of the mix 'tourism, pro-poor and value chains' is acknowledged in various SNV projects, for instance papers such as *'Using the value chain approach for pro-poor development: experiences of SVN in Asia'* (2008) that show how the Dutch Development Cooperation Service has modified the traditional value chain and developed a very innovative system that can be applied in different industries. In the case of tourism, this approach is known as the 'value chain assessment and development in pro-poor sustainable tourism'. The objective is to include small and micro entrepreneurs and producers to address and solve market problems in order to create new jobs and uplift the income for the poor (Springer-Heinze, 2006).

As can be seen in the figure 14 the value chain assessment and development in pro-poor sustainable tourism seeks deeper understanding than the conventional value chain in steps 3 and 4. Moreover, this approach incorporates step 6 which involves monitoring and measuring performance (Ashley and Mitchell, 2008; AFE, 2015).

Figure 14. Six Steps of the Value Chain Assessment and Development in Pro-poor Sustainable Tourism



Source: adapted from Springer-Heinz (2006)

In addition to the conventional value chain analysis, various working papers by the Overseas Development Institute (ODI) and the Dutch Development Cooperation Service (SNV) have highlighted that in order to achieve more substantial outcomes it is required to introduce deeper proactive approaches. In agreement, Ashley and Mitchell's (2008) paper *'Doing the right thing approximately not the wrong thing precisely: challenges of monitoring impacts of pro-poor interventions in tourism value chains'* explains that tourism value chains require an extra step after the analysis of the chain; they denominate this step as an 'intervention'. Likewise, similar programs and actions by other international organisations such as IFC (Mekong tourism, 2015) and EplerWood International (2014) have acknowledged that tourism value chain approaches are not to be used as tools for tourism growth alone, since it is very likely to create sustainability problems. Alternatively, tourism value chains can be adopted as functional approaches that support locals to fight poverty and as an effective method to target other sustainable development issues, such as social inclusion and environmental aspects of the human activity.

### **3.4.1 Barriers and Opportunities to Value Chain and Tourism Value Chain Performance**

Value chains are designed to map out the entire process of enterprises and businesses with the aim to identify barriers and opportunities to participants that form part of it. As claimed in Lusby and Panlibuton's (2007) paper, the performance of the value chain is not a separate task, but one of the most important components of the value chain *per se*. In tourism for instance value chains are (mostly) carried out with the help of participatory exercises to reach goals and organise tasks in hectic situations and to develop appropriate economic models according to the needs of each place (Ashley, 2006). Therefore, using the VCA to reduce poverty and stimulate economic growth will certainly require coming face to face with eminent barriers and opportunities to SMEs participation at different nodes of the value chain. In addition, players in the value chain have to deal constantly with barriers regarding various standards, and very often it is the lack of support to businesses that is one of the principal barriers. For instance, the tool-book '*Making value chains work better for the poor*' argues that the lack of proper organisation in the business development within the value chain can create exactly the opposite outcome for poor people. Instead of addressing barriers which prevent their smooth involvement and building worthy linkages, it may increase barriers and sabotage linkages with possible partners (Van den Berg, 2004). Other constraints pointed out by the tool-book include legal aspects such as making the attitude of the bureaucracy highly important when dealing with pro-poor issues, and also the support of independent parties for micro and small businesses to be able to participate in making decisions and rules required, including in order to overcome such barriers.

According to the literature, members of pro-poor value chains are already expected to encounter certain barriers to development, such as technological opportunities, skills, infrastructure, partnerships, etc. Figure 16 classifies constraints and opportunities in groups, so they can be identified and addressed by interventions along the value chain in order to procure the positive outcome of a project (Lusby and Panlibuton, 2007). Similarly, the tourism value chain analysis identifies barriers and creates opportunities by generating a list of interventions which are also expected to have other results than those obtained by the traditional value chain, given that, by including the tourism

factor there is a change in the game, meaning that the process of collecting data has to be modified to tackle tourism issues.

Figure 15. Constraints and Opportunities of the Value Chain

<b>Technological / Product development</b> <ul style="list-style-type: none"> <li>• Local and small producers (e.g. farmers) do not have the appropriate tools, machinery, or technologies, needed for their products.</li> <li>• Lack of technical skills and production techniques to produce and satisfy customers' demands, this causes income reduction.</li> <li>• Lack of information on product demand.</li> <li>• Opportunity manufacturers to loan machinery and tools to producers to improve the quality of the product.</li> </ul>
<b>Market access</b> <ul style="list-style-type: none"> <li>• Lack of linkages between buyers and producers reduces the creation of new business.</li> <li>• Lack of marketing organisations or brokers, limits the market to small local companies.</li> <li>• Lack of information on product/service demand decreases the ability to produce services/products.</li> </ul>
<b>Organisation and management</b> <ul style="list-style-type: none"> <li>• Inefficacy of producers to organise for economies of scale limits entry chances to other markets</li> <li>• Stakeholders in value chains lack of specific training (e.g. to develop business and production plans, financial accounting, and management and internal organisation).</li> <li>• SME lack of ability to organise buyers or suppliers.</li> <li>• SME lack of communication skills and this results in low cooperation and misunderstandings between stakeholders.</li> </ul>
<b>Input supply</b> <ul style="list-style-type: none"> <li>• High prices of inputs reduces the use of micro and small producers.</li> <li>• Use of poor quality of raw materials can cause low quality on the product.</li> <li>• Local people in rural areas lack access to suppliers, this lowers productivity.</li> </ul>
<b>Policy</b> <ul style="list-style-type: none"> <li>• Import taxes that penalise local producers, decreases competitiveness and increases production costs.</li> <li>• Artificial price subsidies block the entry to small and local producers.</li> <li>• Export taxes increase exporter costs and decrease the competitiveness of the value chain.</li> <li>• Lack or inefficient regulations by the governments reduces entry opportunities to the value chains and reduces opportunities to create strong linkages with possible partners.</li> </ul>
<b>Finance</b> <ul style="list-style-type: none"> <li>• Lack of supplier credit.</li> <li>• Lack of access of commercial funding.</li> <li>• Most local businesses are unable to get bank lending.</li> <li>• Opportunity for exporters to access commercial funding and increase their purchases from small and local producers.</li> </ul>
<b>Infrastructure</b> <ul style="list-style-type: none"> <li>• Bad condition of the roads, electricity, poor refrigeration facilities, telecommunications as a result prices increase and competitiveness declines.</li> </ul>

Source: adapted from Lusby and Panibuton, 2007; Mitchell and Ashley, 2008

Articles and research on TVCA in developing countries (FIAS, 2006; Mitchell and Phuc, 2007; Ashley and Mitchell, 2008; Mitchell and Faal, 2008; CI, 2008; SNV, 2008; Steck et al., 2010; Vignati and Laummans, 2010; Mitchell et al., 2011;

Ventura-Dias, 2011; Mitchell, 2012) have conclusively shown that similar barriers and limitations normally challenge micro and small enterprises. Hence, it is essential to overcome these barriers in order to move forward. Figure 16 portrays some of the most common barriers to tourism value chain performance found in the literature.

Moreover, as seen in figure 15, there are also several barriers and constraints to the inclusion of poor and indigenous peoples, and participation within tourism related activities.

Figure 15. Barriers to Tourism Value Chain Performance

1. Poor and indigenous peoples are normally excluded the economic benefits generated by the tourism industry.
2. Sustainable tourism ventures (e.g. ecotourism, CBT, CBE, natural and rural tourism) are often developed in far and isolated places, difficult to reach by tourists.
3. Lack or inadequate planning before the development of the tourism businesses i.e. insufficient knowledge of policies, regulations, access to capital, how to deal with tour operators, tour guides, publicity and marketing.
4. Lack of incentives (e.g. knowledge and skill development) and resources (e.g. technology, infrastructure, commodities) build up restrictions to poor and indigenous peoples or keep them from upgrading their small businesses.
5. Flaws inside the tourism companies' e.g. low quality products, poor provision of services, non-existent knowledge of foreign languages, lack of administration and other management skills.
6. Tourism ventures are no longer sustainable after spending the fund received by the government or NGO.
7. Lack or mediocre government or NGO guidance in assisting, assessing and monitoring tourism developments.
8. Lack of capital - for investment, operating expenses, shares, publicity and marketing.
9. Unfamiliarity with the tourism market of the region or country i.e. lack of knowledge of market segments and demands (e.g. targeting the wrong segment of the market).
10. Lack or mediocre use of publicity e.g. failure to understand which market segment to target, would most likely lead to select inadequate publicity tools and methods.
11. Absence of tourism or not enough time spent at the local communities by international tourists (i.e. tourists do not spend enough money at the destination).

Source: author's elaboration



Figure 16 below indicates some of the most common opportunities generated by the performance of the TVC found in relevant works.

**Figure 16. Opportunities of the TVC Performance**

<ol style="list-style-type: none"> <li>1. Contributes to expand or create SMEs given the demand for products and services boosting the local economy.</li> <li>2. Contributes to the upgrading of hospitality services (e.g. accommodation, tours and other activities), local products such as traditional food and souvenirs (e.g. handicrafts and indigenous art).</li> <li>3. Enhances the upgrading or creation of infrastructure for the local community (e.g. roads, schools, clinics).</li> <li>4. Promotes human capacity and the development of the adequate skills in order to reduces barriers to new participants (poor and indigenous peoples).</li> <li>5. Creates stronger linkages among the TVC and the collaboration between private and public sector and other stakeholders (i.e. identifies adequate conditions for the participation between service, product and accommodation providers).</li> <li>6. Reduces gender barriers by supporting women involvement within the tourism activity including decision-making, administration and control of tourism ventures.</li> <li>7. Encourages business upgrading within the TVC and also a way out of the tourism industry (e.g. food and craft providers may have the possibility to sell their products outside the tourism opportunity spectrum).</li> <li>8. Encourages the acquirement of knowledge and the development of skills among participants and the local community.</li> <li>9. Inspires and can assist towards the sustainable development of tourism and helps to create conscience regarding nature and conservation issues.</li> </ol>
Source: author's elaboration

Hence, the TVCA not only focuses on providing economic outcomes, it also helps to achieve other equally important goals based on sustainable development principles, and thus determining and assisting to introduce or to reinforce sustainability in the entire community, rather than just within the tourism industry. On that account, the tourism value chain analysis acts as an essential tool to judge circumstances and develop procedures to tackle barriers in pursuance of new opportunities to empower and improve micro and small enterprises. It does this based on the results of its own analysis, which should result in a reliable evaluation of strengths and weaknesses at each point of the chain. Therefore, as noted by

Ashley and Mitchell (2008) it is worth mentioning that the adequate performance of the TVCA is highly important to accomplish favourable outcomes towards the implementation of further approaches and interventions.

Subsequently, to overcome these barriers it is necessary to accurately perceive the tourism sector first. In the case of the present thesis - to evaluate the participants' role at each point towards the tourism activity, such as linkages among other local partners and organisations, given that one of the main objectives of the tourism value chain analysis is to recognise constraints among the supply-division of tourism services and products to overcome issues, which restrain the growing process. Consequently, the TVCA provide important opportunities to participants when used as benchmarks for particular modifications, addressing missing compatibilities among businesses and proposing the creation of meaningful interventions in order to better achieve poverty reduction as part of more sustainable tourism development.

### **3.5 Interventions**

Interventions in the context of value chains can be seen as a set of provisional actions implemented by external organisations (e.g. government, NGOs) with the vision to link and upgrade value chain actors. The purpose is that these actions serve to stimulate a change inside the chain structure, such as the performance of the actors (Springer-Heinze, 2007; Rylancer et al., 2009). Meaning that, an intervention as a step forward of the tourism value chain analysis seeks to modify its operations and improve its competitiveness, while trying to integrate local people and businesses to its operations to maximise the impact of tourism on local economies.

Interventions can also be seen as business strategies. Strong evidence from several investigations by the Overseas Development Institute (ODI), the Dutch Development Cooperation Service (SNV), and the International Finance Corporation (IFC) (Van den Berg, 2004; Mitchell and Chi, 2007; Ashley and Mitchell, 2008; Mitchell and Ashley, 2009; Ashley et al., 2009c; Mitchell et al., 2009; ITC, 2010; Steck et al., 2010) argue that, there are important implications regarding their application in pro-poor and tourism value chain approaches. For instance, a precise

analysis of the data gathered i.e. well documented issues are required to measure the effects throughout the chain, and then from the beginning to the end of the intervention. Furthermore, these projects (some of them case-studies on the ground) have acknowledged that all sorts of interventions can be of assistance to poor and local people. In agreement with the aims of the present thesis, these investigations have demonstrated that the development of interventions should be sustainable, benefit poor people and help them to participate and upgrade among the chain. In other words, interventions can happen at any node with any partner (direct and indirect), not just in the context of producing certain tourism products that poor and indigenous peoples normally are categorised to do (e.g. handy-crafts or souvenir stalls) which is the case in most rural and community-based tourism and ecotourism destinations. This is a type of constraint that often excludes them from economic growth benefits.

Nevertheless, the fact that these changing actions can happen at any node or with any partner, may be seen as too broad or too ambitious for tangible outcomes; to avoid this problem there is a need to prioritise interventions. Therefore, when referring to interventions there is always a list of potential actions that has to be created depending on the issues identified in the tourism value chain analysis. For instance, in accordance with the outcomes of the TVCA in Zanzibar Island, interventions suggested by the researchers focused on three priority areas: first, the development of SMEs - where the majority of the retail providers are foreign; second, creating linkages - upgrading participation of SME and other tourism businesses; and third, generating employment - linking businesses (e.g. hotels and restaurants) with local producers (e.g. farmers and fisher men) (Steck et al. 2010). Even though there is little tangible proof that these actions may succeed, the available evidence suggests that if priority interventions are properly implemented and monitored, some growth and net benefits for the poor may be achieved.

Similarly, the TVCA leads to intervention-actions that are expected to have specific results rather than those obtained by the conventional value chains, given that by including the tourism factor the entire data collection process has to be adapted. Hence, as conveyed by Ashley and Mitchell (2008), Ashley et al. (2009), and Steck et al. (2010) the intervention procedure may differ depending on external facilitators supporting the approach. Bearing in mind that there is relatively little literature published on interventions regarding TVCA most of the cases reported that

the results expected from the interventions in a TVC are significantly similar, in which tourism development boost the empowerment of local participants and helps them to increment their income along with non-economic benefits such as social, and environmental. For instance, figure 17 shows examples of the possibilities that working with interventions can entail as a result of a TVCA.

**Figure 17. Interventions can involve**

- Making direct relations with poor producers (e.g. carpenter, farmer) to assist upgrading their products or commodities to respond the markets' demands.
- Engaging with ecotourism enterprises, tour operators, accommodation providers and field workers, at their request (i.e. deal with pricing), to work better with local enterprises.
- Participating with local, regional or national governments on the development of policies and regulations for the working environment with the aim to eliminate barriers that SME normally face.
- Working with tourists and their marketing, to understand and regulate tourism behaviour and spending patterns.
- Engaging with a wide range of stakeholders in the TVC to boost their relationships (e.g. better communication, trust) and linkages (e.g. trade and commercial linkages).

Source: adapted from Ashley and Mitchell, 2008

Interventions often require the involvement of the government, the private sector, or NGOs, mostly because these institutions can provide and identify the resources required acting on the plans and to increase and improve value chain efficiency (Van den Berg, 2004; Springer-Heinze, 2007; Rylance et al., 2009). However, flawed and unsuitable settings can cause the opposite effect (e.g. breaking linkages, and contribute to constrain issues related to the integration of the poor within the chain). Thus, it has to be understood that, even though, external parties normally develop interventions, these should be driven by the needs and perspectives of the interested parties (i.e. poor/local people). For example, according to the paper 'Can tourism offer pro-poor pathways to prosperity: examining evidence on the impact of tourism in poverty' (Mitchell and Ashley, 2007) there is some existing documentation where interventions created to benefit poor people through the tourism activity have also accomplished benefits for poor people

in others areas related to labour legislation, human resources, agricultural and other type of producers, and to the development of infrastructure.

Consequently, understanding that intervention *per se* can be defined as “involvement in a difficult situation in order to improve it or prevent it from getting worse, or an occasion when is done” (CUP, 2015) it is no surprise that, as the existing literature indicates, the incorporation of interventions after the tourism value chain analysis seems a viable way to target tourism-related issues (e.g. economic, sustainable, social) more effectively while ensuring the quality of the products and services in order to create a greater impact.

## **3.6 Review of Existing Case Studies**

### **3.6.1 Main Organisations and Approaches**

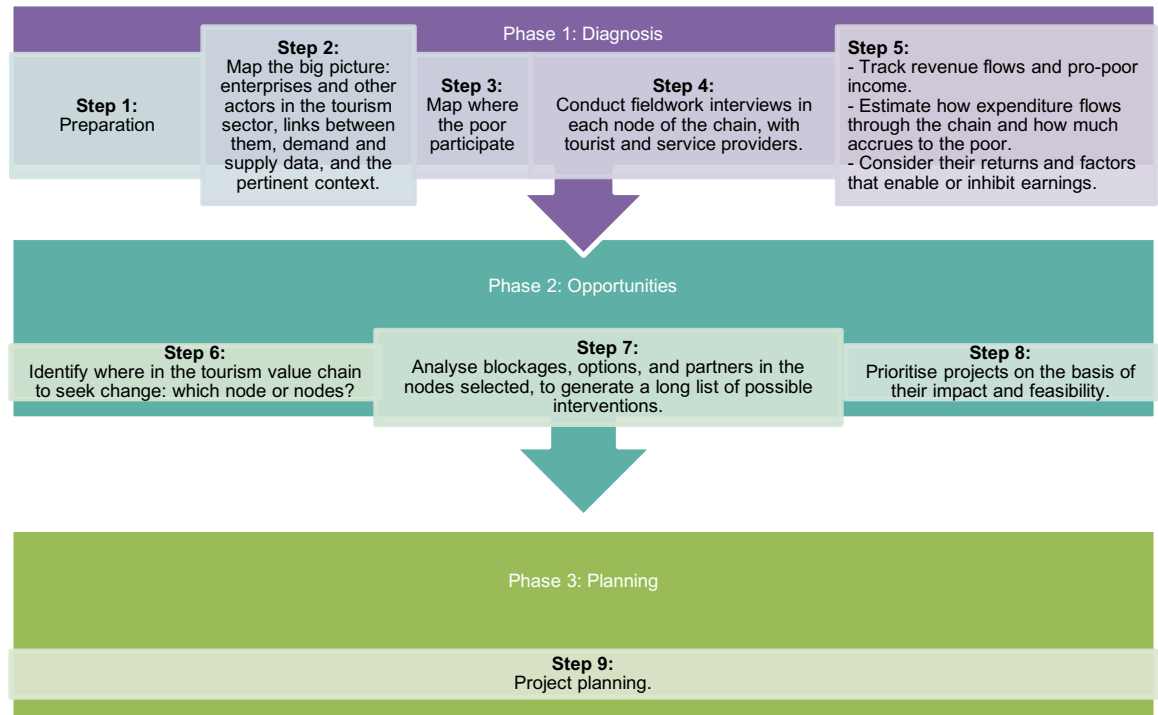
As previously seen, a fair number of research publications on tourism value chains are produced through the engagement of international development organisations such as the Overseas Development Institute (ODI), the Netherlands Development Organization (SNV), the International Trade Centre (ITC), the International Finance Cooperation (IFC), Conservation International (CI), the United States Agency for International Development (USAID), the German Federal Enterprise for International Cooperation (GIZ), and the World Bank. These organisations have adopted similar but also differing approaches in their research methods and action plans; however, some of them have developed partnerships between each other or with other parties (e.g. national governments and other development agencies) for the study of particular projects.

## ODI, SNV, IFC and ITC

As acknowledged earlier in this chapter, tourism was incorporated in the 'pro-poor value chain' approach developed by ODI, IFC and SNV to create the tourism value chain approach. It is important to establish the relationship between tourism and poverty reduction given that ODI projects are focused on policies and practices related to the reduction of poverty and the achievement of sustainable livelihoods (including sustainable tourism) in developing countries. Moreover, ODI projects are often financed by the SNV and IFC; these organisations together have studied several projects and developed plans of action in developing countries, mostly in Africa and Asia (e.g. Laos, Gambia, Vietnam, Nepal, Rwanda). These projects have presented a closer look towards achievements in the field of tourism value chains (e.g. methods and issues), concentrating mainly on activities such as mapping the chain to establish where poor people participate along the chain, and where the revenue generated by tourism terminates.

The review of the literature revealed diverse methodologies used by different organisations when studying tourism value chains. For instance, ITC's methodology to assist the '*Tourism-led poverty reduction programme (TPRP)*' as a part of the UN MDGs by operating through pilot projects that could potentially assist tourism to generate an influence on poverty reduction in the developing countries. The United Nation's World Tourism Organization (UNWTO) and their Sustainable Tourism Eliminating Poverty (STEP) programme have also been involved in the study of tourism value chains, although their engagement has been scarce and they have not actually conducted many specific projects on their own. For instance, one of the first TVC approaches can be seen in figure 18 'Nine-Steps of the Tourism Value Chain Analysis,' the method integrates nine steps in three phases. As reported by the ITC, these guidelines of the programme provide the basis (1) for researchers to use when mapping the field, (2) to revise the outcomes of the TVCA in order to (3) develop sustainable interventions that should include economic, social and environmental criteria (Ashley et al, 2009a). This approach has been implemented by ITC, ODI, SNV and IFC in countries such as Brazil, Colombia, India, Laos, Mozambique, Philippines, Senegal and Vietnam.

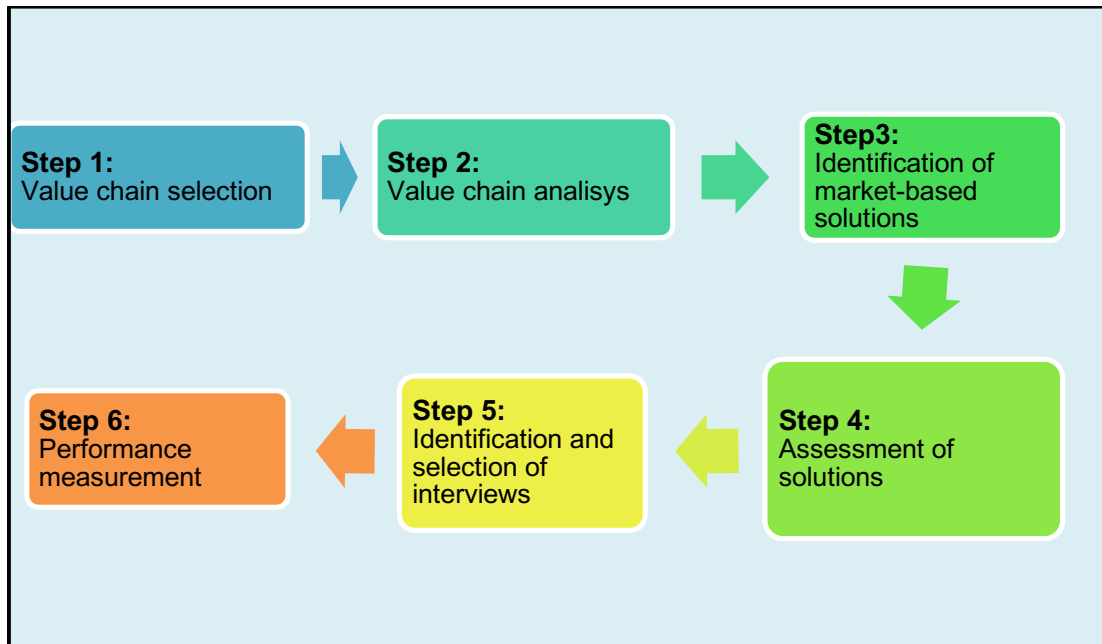
Figure 18. Nine- Steps of the Tourism Value Chain Analysis



Source: adapted from Ashley et al, 2009a

Another approach applied in the analysis of tourism value chains is the ‘Key Steps in Value Chain Programme’ (see figure 19), based on the steps of the value chain approach created by Action for Enterprise (AFE) to assess companies in the supply sector that sell and buy from one another (e.g. retailers, producers, wholesalers) until the product reaches the final consumer (AFE, 2015.). This has also been adopted by the SNV to assist pro-poor value chains in several productive sectors, tourism among them (Ashley, 2007; SVN, 2008). The adoption of this approach permitted analysis of the whole tourism sector by mapping out the reach of the tourism value chain at the destination; consequently, the approach was also adopted in some ODI and IFC projects partnered with the SNV.

Figure 19. Key Steps in the Value Chain Programme



Source: adapted from AFE, 2015

In addition, the SVN has also assisted national and international institutions (e.g. travel agents) and governmental organisations (e.g. ministries of tourism, municipal councils) in the study of the tourism value chain, particularly in countries of Africa and Asia. In the case of Africa, SNV created a pro-poor tourism (PPT) development approach based on how the tourism industry generates opportunities for different groups of the communities (e.g. women, young and poor people), enhance financial flows in the region, and the important role that small and medium enterprises play in integrating vulnerable groups among the local tourism value chain (Vignati and Laumans, 2011).

Taking a different approach, the paper *‘Doing the right thing approximately not the wrong thing precisely: challenges of monitoring impacts of pro-poor interventions in tourism value chains’* by Ashley and Mitchell (2008), offers baselines for direct tourism value chain interventions and provides recommendations to diagnose, evaluate and monitor the impacts. As pointed out by the authors, one of issues constantly found among PPT value chain projects is the need for a careful methodology that enables practitioners to properly monitor and evaluate the outcomes. In addition, the paper also reviews case studies in nine countries



between the years 2006-2008, when most projects were studied by ODI, IFC and SNV.

In reviewing the projects by ODI, IFC, SNV and ITC, it can be noted that the central objectives of their studies were to create benefits for the poor population at each destination studied; through the increment of pro-poor income (PPI) and the financial flows that these create among the poor, rather than through the general economic growth of the entire community (with hopes of some 'trickle-down' effect). Moreover, sustainability objectives such as the conservation of the environment and the sustainable use of the natural resources seem to be present in the projects; however, they appear to fall into a second or third place rather than being granted equal or balanced priority. Moreover, although these organisations have carried out several excellent tourism value chain case studies in Africa and Asia, they have hardly studied any cases in developing countries of the Americas, except for one project in Brazil.

### **The World Bank**

The World Bank, ITC, and FIAS were among the organisations that initially used value chains as tools to increase the competitiveness of particular destinations through tourism. For instance, they studied the tourism value chain activity in Mozambique in cooperation with the Mozambican Ministry of Tourism (MITUR). This project mapped out the tourism value chain in five different itineraries to serve competitive proposes, particularly, to enhance the economic growth of respective regions of Mozambique. Consequently, the study (see table 4) recognised the effectiveness of the TVCs in evaluating the performance and issues of suppliers, service providers, and other intermediaries among the tourism sector that posed a threat to Mozambique's competitiveness (FIAS 2006a; 2006b).

Other projects carried out by the World Bank were two parallel case studies in Ethiopia. The first case study aimed to strengthen the countries' economy through the tourism activity, based on Ethiopia's government (GOE) objectives. These objectives stated that tourism needed to be developed based on sustainability

grounds, therefore, maintaining social, cultural, and environmental assets of the country (see table 4). In addition, tourism also had to act as an aid towards economic growth and poverty reduction (Mann, 2006). However, the analysis of the tourism value chain on the ground prioritised targeting the competitiveness issues of the areas studied, rather than to identify potential approaches for the inclusion of poor people in the economic stream generated by the tourism activity. The second case study identified the economic spill-over left at the destination by four types of visitors. Moreover, the study evaluated barriers and constraints to overcome along the tourism supply chain; and equally to the first case studied, the outcomes offered advice to increment the competitiveness of Ethiopia's tourism in a sustainable way. Yet, the study did not show any particular evidence of the impact of tourism on poverty (Ashley and Mitchell, 2008).

Furthermore, the World Bank methodology served as a direct approach to analyse tourism through value chain studies in different countries (e.g. Lesotho, Cambodia and China) where, each value-adding transaction in the supply chain from consumers in markets to producers in countries is examined through its constituent factors of cost and time (Hawkins and Mann, 2007).

In consequence, the development of this tourism value chain approach over the past decade was illustrated with examples given from two key applied research emphases: (i) changing business practice by working with the mainstream tourism industry; and (ii) VCA as a means to understand how the participation and inclusion of marginalise people can be improved (Mitchell and Fall, 2006), while the PPT approach is still in its 'development stage' and further research is needed (Mitchell and Ashley 2009b; Meyer, 2011).

## **CI and USAID**

Conservation International in the context of tourism and value chains, aims to assist the establishment of sustainable (or already established) and lasting projects in nature-based tourism destinations. This includes upgrading SMEs to increase their competitiveness and creating economic growth while supporting the

conservation and biodiversity of the natural environments as well as providing aid towards poverty reduction (CI, 2008). To achieve its objectives, CI has partnered with the USAID, studying projects in countries like Ecuador and Madagascar.

In Ecuador, three tourism projects evident in natural areas were studied: Mindo, Puerto Lopez, and the Napo River basin. These projects sought to use the tourism value chain outcomes with the following goals: first, to design plans and tactics with the potential to aid Ecuador's ecotourism in regaining its competitiveness (mainly, to Peru and Costa Rica — Ecuador's principal competitors); second, to generate capital flows and optimise positive impacts among rural and marginalised communities; third, to contribute to the sustainability of tourism and therefore, to environmental conservation (Fries et al., 2006). The data was gathered by two approaches: the Nature, Wealth and Power (NWP) and the VCA. According with Fries et al. (2006), these two approaches complemented one another, given that the NWP approach evaluated social, environmental and economic components in nature-oriented enterprises (e.g. management and administration); while, the VCA evaluated barriers and opportunities incidental to the competitiveness of tourism enterprises among other factors. This method used qualitative and quantitative tools to collect data based on a 7-step approach, every step followed the outcomes of the step(s) preceding.

In Madagascar, CI and USAID recently studied two protected areas (PAs): The Ankeniheny-Zahamena Corridor and the Menabe Region (USAID and CI, 2009). The objectives were very similar to those in Ecuador — to support competitiveness of micro and small enterprises (e.g. enhance linkages, upgrade strategies, recognise opportunities and constraints to SMEs), to increase economic flows, and to ensure a contribution to ecological conservation and the reduction of poverty (Fries et al., 2006; USAID and CI, 2009). Hence, learning from Ecuador, Conservation International claimed to use a more dynamic methodology in Madagascar, which consisted in the analysis of a nature-based TVC project cycle (figure 20) followed by a casual model and a 5-objective framework that is considered to be the foundation for Madagascar's intervention strategy during the 2006-2009 period (USAID and CI, 2008; CI, 2008).

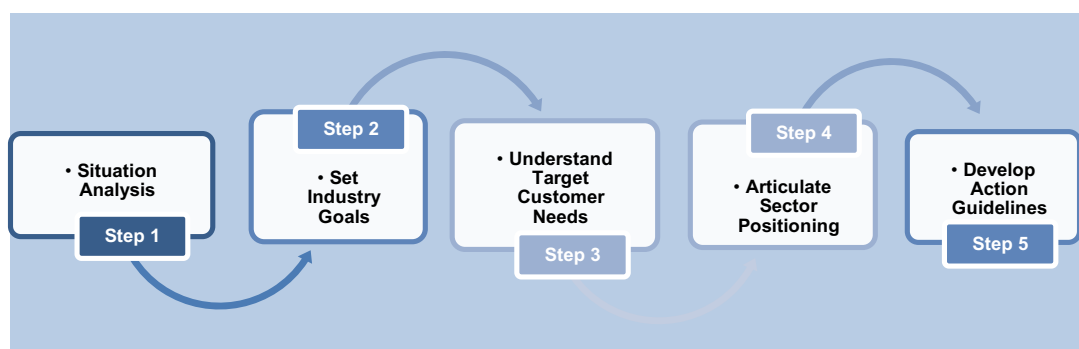
Figure 20. The Nature-Based TVC Project Cycle



Source: adapted from CI, 2008

Nevertheless, throughout a review of Madagascar’s case study report, it is not very clear why its methodology was considered to be more effective, than the one used in Ecuador. In any case, both projects’ practices have been used to adapt particular and suitable ingredients to improve and upgrade the nature-based tourism value chain in other marginalised tourism destinations alike. USAID has also built partnerships with other organisations, for instance, based on the OTF Group 5-step approach, the USAID studied cases in Rwanda. These cases incorporated tourism value chain projects to aid conflict-affected places to overcome some of their problems (USAID, 2008). This was a precarious project given the circumstances of the country at the time. Nonetheless, the TVCA proved to be a resourceful tool by aiming tourism in the right direction, and thus, generating more economic opportunities, which were highly important in the process of Rwanda’s restoration.

Figure 21. The OTF Group 5-step Process in the Tourism Industry



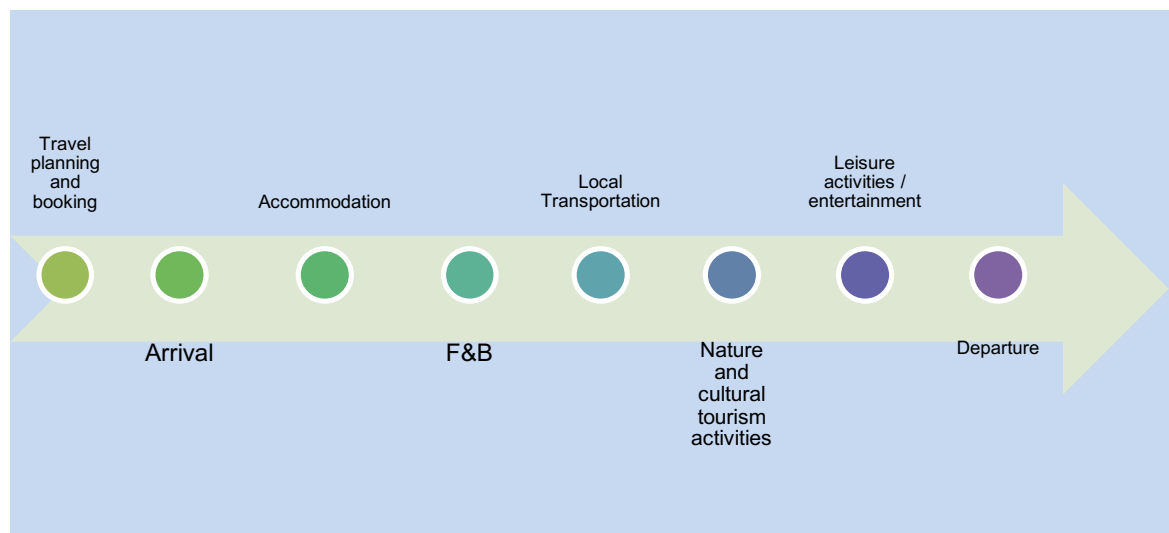
Source: adapted from USAID, 2008

The CI’s TVCA focuses in long-term approaches aimed to work with Nature-based tourism projects to support conservation outcomes and generate economic benefits

## GiZ

The German Federal Enterprise for International Cooperation has vast experience working with value chains and methodologies ( figure 22) to asses them. The primary objective of their value chain approach is to include poor and marginalised population groups into the dynamics of the tourism value chain and to rebalance the distribution of income within the value chain in favour of these groups. GiZ's studies in tourism are not limited to niche segments, but are directed at all forms of tourism, including mass tourism (Beyer, 2014).

Figure 22. The GiZ Tourism Value Chain



Source: modified from Beyer, 2013 and 2014

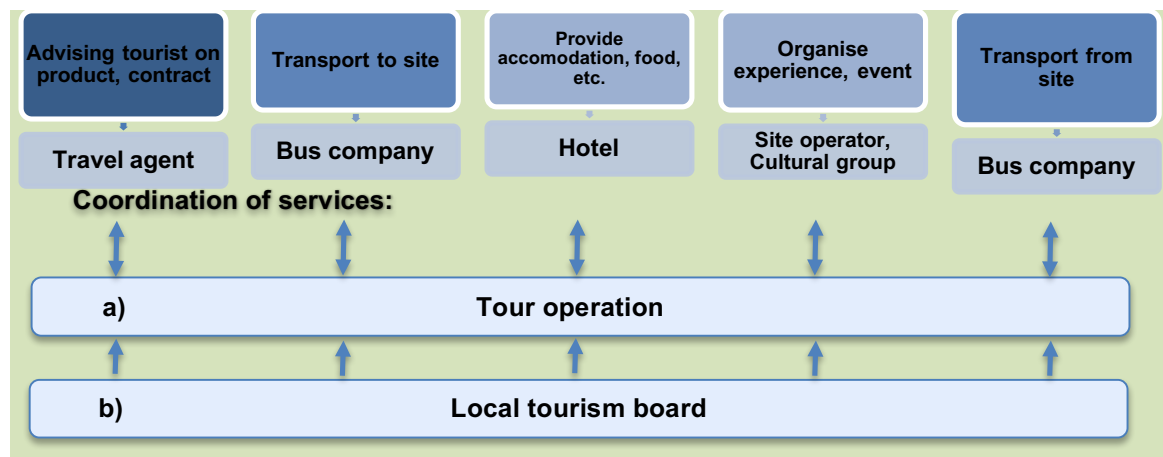
Furthermore, GiZ main methodology for the study of value chains is found in the ValueLinks Manual (see figure 23), which has become a reference to be used by development institutions, public and other organisations with the aim to promote economic development.

The ValueLinks manual is an action-oriented set of methods for promoting economic development with a value chain perspective - enhancing employment and business income of SMEs- from practitioners for practitioners working on the fields of

development cooperation and value chains with a focus on product markets that offer opportunities for the poor (Springer-Heinze, 2007; ValueLinks, 2014)

Figure 23. ValueLinks Manual

**Value chain map showing sequence of services provided to tourist consumer**



Source: modified from Springer-Heinze, 2007

Throughout the literature review three GIZ-TVC projects were identified: Sri Lanka and the Philippines in Asia, and Albania in Southeast Europe. GIZ promotes the analysis of value chains as a multi-sectorial approach based on the needs of the interested parties using a 'bottom-up' approach, thus, it uses the value chain methodology with the objective to improve competitiveness and framework conditions in various sectors (e.g. agriculture, farming, tourism) in a sustainable way, and to contribute to a significant raise in income-generating employment (Ritcher, 2006a and 2006b). This approach was applied to seven emergent sectors in Sri Lanka, alternative tourism amongst them. The aim consisted in improving the competitiveness of SMEs in a sustainable way; leading to a substantial improvement towards the generation of income through the employment of economically disadvantaged groups. Furthermore, this was part of a broader national program.

GIZ used the TVC to study mass tourism projects by evaluating the value chains of the hotels at each destination, this study collected general information about the business (number of rooms, occupant rates), as well as detailed information on the employees, the purchase of goods and services offered, and the resort's commitment to social and ecological responsibility in the destination. Moreover, the analysis of the socio-economic effects of all-inclusive resorts in Dominican Republic, Jamaica and Nicaragua (Beyer, 2014) where results concluded that in that area of development cooperation GIZ could give valuable support (such as through capacity development or the establishment of the local value chains).

For instance, in the case of Bohol, in the Philippines, the TVCA was used by GIZ to support and coach the Department of Trade and Industry (DTI) and many other sectors which improved their competitiveness by using the approach. Thus, the value chain was used to analyse the province's priority sectors and to develop upgrading strategies. Moreover, the initiative of GIZ-PSP provided private sector promotion, and the report was prepared with the objective of supporting the DTI and the tourism sector in developing countries to upgrade the competitiveness of the tourism sector using the various tools from the value chain and a SWOT (strengths, weaknesses, opportunities, and threats) analysis. Findings suggested that by including production sectors into the TVCs has contributed to the major sources of incomes in Boholano families who are agriculture-based i.e. farming and rising. This project also incorporated a Biodiversity Conservation and Ecotourism Framework Plan 2006-2015 (Paquibut, 2014a and 2014b).

### 3.6.2 Review of Tourism Value Chain Studies

Recapitulating, section 3.6.1 Main Organisations and Approaches, has provided a comprehensive review of the most important development organisations and international institutions such as the Overseas Development Institute (ODI), the Netherlands Development Organization (SNV), the International Trade Centre (ITC), the International Finance Cooperation (IFC), the United States Agency for International Development (USAID), Conservation International (CI) and the World Bank (in partnership with other governmental and non-governmental organisations), that have employed the value chain approach within the tourism industry as a tool for analysis, business development, and a strategy to reduce poverty.

As a follow-up, table 4. Review of Tourism Value Chain Studies comprises a short analysis of the most representative studies employing the value chain approach within the tourism industry. Thus, the table contains thirty-two case studies<sup>4</sup> situated in twenty-five countries mainly found in Africa (e.g. Cambodia, Ethiopia, Gambia, Madagascar, Mozambique) and Asia (e.g. Bhutan, India, Laos, Vietman), but also includes a few from Latin America (e.g. Ecuador, Brazil, Costa Rica) and South East Europe (e.g. Albania, Macedonia, Serbia). Hence, the short analysis of these existing tourism value chain case studies include: a summary of (1) the type of methodology<sup>5</sup> and scope, and which organisation employed it within each case study; (2) the outcomes of the research or main findings; further, if the case studies measured or was in any way beneficial to issues such as (3) environmental affairs, and (4) poverty reduction; and finally, if the case studied was any way relevant to (5) Indigenous Peoples.

Consequently, as suggested in the summaries of the table, the review of these existing TVC studies has indicated that the approaches employed have both strengths and constraints as well as many similarities, particularly regarding the economic growth on the tourism areas studied, throughout the reduction of poverty.

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<sup>4</sup> Some of these case studies have already been referred in section 3.6.1 Main Organisations and Approaches.

<sup>5</sup> The main TVC approached have been analysed in more detail in section 3.6.1 Main Organisations and Approaches.



Table 3. Review of Existing Tourism Value Chain Studies

Country and study	Type of methodology and scope	Main findings	Environmental affairs	Poverty reduction	Indigenous peoples
<b>Argentina</b>					
TVC - Patagonia region CALAFATE, 2004 CAT / UIA	CA and SWOT analysis to interpret roles and actors of the VC to create and enhance income-generation.	The outcomes were used to redesign action plans and to create a common vision into a joint working agenda.	Not particularly.	No evidence of its impact among the poor.	No.
Tourism development through the VCA in the central region of Argentina Mauvecin, 2010 CFI		Multi-plan approach including: integration criteria, potential products and actions to enhance local, regional and provincial development.	Nature-based tourism is popular in the central region yet; it is only implied within the study.	No evidence of impact among the poor.	No.
<b>Albania</b>					
More links and diversity for added value ITVCA in the Korca region. GIZ Albania, 2014	ITVCA to analyse, prioritise and implement effective actions to sustain linkages for economic growth.	Linking new trends to tradition, history and culture to increase market competitiveness.	Not particularly.	No evidence of impact among the poor.	No.

<b>Brazil</b>					
The TVC in Porto de Galinha, Northeast Brazil Slob and Wilde, 2006 SOMO and IUCN - NL	TVC framework developed by SOMO, CICLO and IUCN NL on a package deal in the northeast region of Brazil.	The TVCA provided bases for recommendations directed to tourism stakeholders e.g. in policy-planning, safety measures, infrastructure and transport system issues.	Despite sustainability aims, the tourism sector needs improvement in several areas.	Recommendations: Government to cater the needs of locals. MSEs- to build links with local producers and to hire locals.	No.
<b>Bhutan</b>					
VCA of the Nabji tourism trail in Sonam Lhamo, Bhutan SNV n.d. Hummel et al., 2013	ITC methodology TPRP and VCA to evaluate the Nabji tourism trail.	Local economic growth and the project has proved to be sustainable over the years.	The VCA reconciled income-generation aims with environmental and social objectives.	Direct and indirect income for locals e.g. craft sales and agricultural products.	Perhaps, but there is no mention in the study.
<b>Cambodia</b>					
TVCA in Cambodia IFC and MPDF, 2007 Ashley and Mitchell, 2008	ITC methodology TPRP and 9-steps of the TVCA guideline. Calculating the local economic impact and PPI mapping.	Low share of expenditure reaching the poor.	It is possible to increment PPI with fewer impact on the environment.	PPI may grow with more tourism visits to second tier destinations.	
Responsible travel market in Cambodia SNV, 2011	TVC development and 3-survey approach to study supply chain linkages.	Responsible tourism is good business for the provider, supplier & the environment.	Enhanced sustainability performances among the tourism market.	Inclusion of the poor within the economy.	Perhaps, but there is no mention in the study.

<p><b>Colombia</b></p> <p>Employment of the VCA in sustainable tourism for the village of Puerto Nariño in the Amazon, as an input to the certification of sustainable tourism destination. Lopez et al., 2008 IMANI</p> <p>Suesca (Cundinamarca), Colombia. Lopez and Ochoa, 2008/ Ochoa, 2009 Ochoa and EDESA 2009/ Lopez, 2010 Moreno and Ochoa, 2011</p>	<p>CIAT's (1999) field annual for designing strategies to increase competitiveness on small scale producers. Value chain methodology developed by CIAT &amp; Humboldt Institute.</p> <p>VCA developed by CIAT &amp; Humboldt Institute- to pinpoint the chain's weak links and to introduce a strategy and action plans to overcome them.</p> <p>to evaluate the competitiveness of 3 tourism sectors: (1) transport, (2) accommodation, and (3) recreational activities.</p>	<p>TVC outcomes advice to: diversify the tourism offer by generating new sustainable tourism types with traditional-cultural elements and aspects to create an agreement within tourism providers to promote the destinations, due that lack of publicity was the main gap found in the VCA.</p> <p>TVC findings showed transport infrastructure is in good shape with few issues to solve, and 74% of the accommodation services fulfil requirements, the other 26% lack mostly of HR skills.</p>	<p>Study proposes that by acquiring a certification as a sustainable tourism destination, encourages viable regulations &amp; environmentally-friendly policies while adding value to the destination to increase tourism arrivals.</p> <p>Phase 3 promotes ST development.</p> <p>Natural resources are well managed by the providers 80% have recycling programs 100% have trails to keep tourists from damaging the nature, and 53% have signs to remind tourists to keep along the trails.</p>	<p>Promotes the inclusion of various groups within the tourism activity. e.g. For SMEs to employ local people and the development of CBT.</p> <p>No consequential evidence of the impact among the poor.</p>	<p>Tikunas, Yagas and Cocamas.</p> <p>Perhaps, but there is no mention in the study.</p>
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<b>Costa Rica</b>  Sustainable tourism chains and PPT connecting small-scale enterprises in Costa Rica to the Dutch market. Caalders et al., 2003 Van der Duim and Caalders, 2008	Integrated chain management in sustainable tourism chains using top-down and bottom-up approaches- to evaluate 24 tourism initiatives to tour operators in Costa Rica and the Netherlands.	The findings of the TVCA showed that the PPT approach was not viable, due that only 4 out of 24 tour operators formed part of the tourism chain.	Not particularly.	No tangible evidence of the impact among the poor.	No.
<b>Ecuador</b>  Nature-oriented tourism in Ecuador and the TVC in Mindo, Puerto Lopez and the Napo river Basin. Fries et al., 2006 ACDI/VOCA. IRG, USAID, 2006	NWP and VCA 7-step approach to design plans for Ecuador to regain its competitiveness.	Ecotourism is Ecuador's comparative advantage. Thus, a competitive strategy and action plan was designed to regain its competitiveness. The action plan included four potential elements of a strategic vision.	Enabling the environment by creating sustainable policies and regulations, along with environmentally sound infrastructure.	Local communities have been poorly integrated among the chain.	A brief note on Kichwas' issues e.g. culture and land tenure.
<b>Ethiopia</b>  Towards a strategy for PPT in Ethiopia. The World Bank for Government of Ethiopia. Mann, 2006  Enhancing private sector as community	TVCA with a pro-poor element to study four tour operators in Lalibela; to strengthen the local economy and Ethiopia's competitiveness through the tourism activity.  ITC methodology TPRP,	Unviable supply chains and low quality products. Outcomes suggested to rehabilitate the market, skill development for tourism providers, and the integration of ICTs.  Poor tourism infrastructure	Outcomes suggested the creation of a plan that includes regulations and policies for environmental conservation.  Not particularly.	No consequential evidence of the impact among the poor.  Ineffective	No.  No.

engagement in Ethiopia's tourism service. Mitchell and Coles, 2009 ODI/ GoE / UNWTO	the 9-steps of the TVCA guideline and rapid appraisal technique in Lalibela, Axum, Arba Minch and Addis Ababa - aims is to build linkages between tourism and local communities.	(low-end accommodation in Addis), leakages inside the construction sector (import of labour and materials) lack of skills among tourism providers.		integration of PPT, there are significant gaps along the chain.	
<b>Gambia</b>  The Gambian TVC and prospects for PPT. Mitchell and Faal, 2006 & 2008 ODI / SNV	ITC methodology TPRP and the 9-steps of the TVCA guideline to assess linkages in tourism and the poor and suggests actions to promote pro-poor benefits.	A strategic multi-stakeholder approach assisted in securing more than half of the overall tourism spending, successful performance of linkages in the chain. Recommendations: to preserve crafts' quality, fortify business environment, and expand food supply chain.	Enabling the environment by creating sustainable policies and regulations, along with environmentally-sound infrastructure.	Poor people attained 14% of the total tourism expenditure (direct and indirect).	Perhaps, but there is no mention in the study.
<b>Haiti</b>  Inclusive tourism in Southern Haiti Armitt et al., 2014	ValueLinks methodology and AFE approach- to feed into tourism development by the investment of the government and IADB.	Action-plans, interventions, and five main recommendations with series of sub-recommendations, in how PPI and the local economy could lift through the development of tourism.	Although, the sustainability of the destination is implied in the context of the project, there are neither recommendations nor plans.	Each node at the VC was analysed for the income enhancement of poor people, and their inclusion among the chain.	No.
<b>India</b>  Value chain mapping of tourism in Ladakh, India.	TVC and SWOT analysis- were used to map PPT in	Recommendations suggested the integration of viable	Fast tourism growth has caused environmental	TVCA pinpointed barriers to PPT	Ladakhi people.

WWF-India, 2013	Ladakh with the aim to develop a plan for the inclusion of marginal and vulnerable groups within the tourism chain.	opportunities into the tourism chain such as the creation of entry-points to sustainable PPT and actions for environmental preservation.	degradation from the transition of land use, pollution and the increment of livestock.	promotion and offers solutions to overcome them.	
<b>Lao PDR</b>  Luang Prabang tourism and opportunities for the Ashley, 2006a and 2006b Ashley and Mitchell, 2008 ODI/SNV  Tourism in route 9 in Lao PDR and Vietnam: identifying opportunities for the poor. Travers, 2008 SNV	Rapid VCA based in Kaplinsky and Morris VCA  ITC methodology TPRP and the 9-steps of the TVCA guideline and SWOT analysis to evaluate the impacts of tourism in Lao PDR and Vietnam, and along Route 9- the East-West Corridor	Indirect linkages among poor and tourism are stronger than the direct linkages of those working in the sector. Recommendations suggested: re-integrating rural activities, fortify business environment, and expand agricultural supply chains.	Not particularly.  Not particularly.	27% of tourism spending was earned by the poor  Strategies for PPST were proposed for Laos to contribute on poverty reduction. TVCA suggested that Vietnam has a big potential for reducing poverty directly.	Perhaps, but there is no mention in the study.  No.
<b>Macedonia</b> Identifying scalable interventions: TVC development in Mavrovo, Macedonia. Ramadini, 2010	ITC methodology TPRP, the 9 steps of the TVCA guideline and rapid participatory and bottom-	Identified interventions plans: the need of investment for the restoration of traditional areas and the creation of strong	Intervention plan for the protection of culture and natural resources.	Intervention plan to strengthen linkages, promotes SMEs to employ	No.

SNV	up in Mavrovo to evaluate the tourism chain and identify interventions.	linkages between the public, private and civil sectors.		local people.	
<b>Madagascar</b>  Increasing competitiveness of MSEs in the tourism industry of Madagascar. USAID & CI, 2009	CI Nature-based TVC Project cycle to studied 2 protected areas: Ankeniheny-Zahamena corridor and the Menabe region, to support MSEs competitiveness and contribute to poverty reduction and environmental conservation.	Barriers to the tourism projects are: lack of suitable policies within the tourism sector, lack of access to market and capital low quality products and services in some areas. The strategy plan integrated five objectives to overcome these barriers.	PAs are regulated by special policies moreover, objective 5 seeks to increase the amount of biodiversity protected through tourism activities.	Local people from Andasibe and Menabe do not benefit enough from the tourism in the PAs, thus, objective 4 seeks to reinforce links between MSEs and local producers.	Perhaps, but there is no mention in the study.
<b>Mali</b>  Analysis and development of Dogon area - a decision-making tool for communities and local operators. SNV, 2006 / Gravel, 2010 SNV / USAID		Poverty rates have fallen thanks to tourism. The sectors that generate most of the revenues are transport and tourism activities.	Not particularly.	Poverty declined 18.6% with a 10.2% of direct impact taking 10,000 people out of poverty tourism revenues.	Perhaps, but there is no mention in the study.

<p><b>Mozambique</b></p> <p>The tourism Sector in Mozambique: a value chain analysis FIAS &amp; OECD, 2006a and 2006b The World Bank / MITUR</p> <p>Value chain analysis as a kick off for tourism</p>	<p>TVC (boosterism approach) to carry out the mapping of five tourism itineraries to evaluate barriers to competitiveness, and increase economic growth.</p> <p>ITC methodology TPRP and the 9-steps of the TVCA guideline to recognise clusters for PPT development and how earnings are distributed.</p>	<p>Barriers to competitiveness entailed: leakages among the labour sector, weak system of transport and range of products recommendations included: improvement in marketing promotion, business management, and the creation of linkages to benefit the locals.</p> <p>Results showed that by 2011 PPT impact could grow 8-14%, generate 1,600 direct jobs, and give 28,450 people better quality of life. Suggestions entailed the promotion of Mafalala as a sustainable culture tourism product and stakeholder's participation.</p>	<p>Study suggested the rearrangement of policies and regulations towards the conservation of the environment.</p> <p>Not particularly.</p>	<p>No evidence of its impact among the poor. Yet, the creation of linkages to include local people in the chain are recommended.</p> <p>Result showed that by 2011, PPT impact generate \$3US MIL income for the poor.</p>	<p>Perhaps, but there is no mention in the study.</p>
<p><b>Nicaragua</b></p> <p>Sustainable tourism in Granada, Nicaragua. Rainforest Alliance, n.d. Argidius Foundation</p>	<p>TVCA in five enterprises in Granada (2009) to measure the economic impact of ST including direct, indirect and induced effects in the local economy.</p>	<p>Sustainable tourism generates: (1) quality jobs, (2) gender equality awareness, (3) benefits for local providers and new market opportunities, (4) income that creates a multiplier effect in the local economy.</p>	<p>It is implied within the study that environmental resources are vital for ST, yet, there is no solid plan of action towards good practices.</p>	<p>Not particularly.</p>	<p>No.</p>



<b>Philippines</b>					
Development of Bohol TVC. Paquibut, 2011a and 2011b Beyer, 2014 GIZ/ DTI/ DOT/ AF/ STEP	GIZ-TVC: horizontal and vertical value creation, TOWS analysis, and the systematic competitiveness framework to analyse priority sectors and develop strategies for competitiveness.	Upgrading strategies included the improvement of certain issues regarding tourism packages, marketing, crafts, food linkages and infrastructure.	The introduction of the Biodiversity Conservation, work plan, and Greening VC's programme.	Recommend the implementation of development and pro-poor plans.	No.
<b>Rwanda</b>					
Pro-poor analysis of the Rwanda TVC Ashley, 2007 SNV, 2011	ITC methodology TPRP and the 9-steps of the TVCA guideline to evaluate benefits distribution within the tourism sector for the development of strategic interventions.	Not enough revenues reach the poor, food supply chain has a great potential for their inclusion. TVC assisted in developing 9 interventions in these areas including access to the supply chain, employment, product diversification, and pro-poor business models for the accommodation sector.	Master plan implemented in sustainable tourism and conservation.	Create further links for farmers to participate in hotels' food chains	No.
Rwanda TVC case study USAID, 2008	The OTF Group 5-step process in the tourism industry to identify upgrading alternatives and overcome market barriers to competitiveness.	The analysis showed that Rwanda is still tainted by the genocide, a change on the product and image is needed and the creation of high-end markets. Recommendations entailed brand building, links among MSEs, and actions to win higher forms of capital.	Not particularly.	Not particularly.	No.
<b>Country and study</b>	<b>Type of methodology and scope</b>	<b>Main findings</b>	<b>Environmental affairs</b>	<b>Poverty reduction</b>	<b>Indigenous peoples</b>

<b>Serbia</b>					
TVCA in South Serbia case studies in six tourism destinations Mojic, 2012	Hypothetical VC model-carried out in six tourism destinations to evaluate market segments by profitability and generate an authentic tourism product.	Results showed that the VC model has the potential to assist towards tourism development, and the design of new tourism attractions.	Findings revealed that anthropogenic and natural resources are imperative among tourism providers.	Not particularly.	No.
<b>Sri Lanka</b>					
Analysis of the alternative TVC Ritcher, 2006a & 2006b GTZ-Integration	ITC + ValueLinks methodology, trickle-down and bottom-up approaches for the mapping of all stakeholders to include them into the tourism chain.	Alternative tourism created 125,000 jobs in 2003-2005. Recommendations to increase competitiveness entailed to grant certifications for tourism areas, create long term agreements within stakeholders, and enhance local participation.	TVCA introduced reforms and frameworks to SMEs towards the conservation of the environment.	Integrates poor people within the VC.	Perhaps, but there is no mention in the study.
Tourism sector value chain analysis Carl Bro, 2008 in Ashley et al., 2007 IFC / World Bank	TVC (boosterism approach) to develop plans of action to improve SMEs productivity in the tourism sector.	Barriers among in the tourism chain included: lack of communication among SMEs and government, weak market development, and lack of skills from tourism providers.	Not particularly.	Not particularly.	Perhaps, but there is no mention in the study.
<b>Tanzania</b>					
Making success work for the poor: package tourism in Northern Mitchell, et al., 2009 ODI / SVN	ITC-TVC methodology TPRP to study the pro-poor impact of tourism in Mount Kilimanjaro and the Northern safari circuit.	Tanzanias' strategy has been successful in these two regions, with high revenues reaching the poor. Suggestions for improvement include further support for local communities,	Not particularly.	Pro-poor spending reaches over US\$13 MIL, 28% of total tourism in Mount Kilimanjaro and over \$US 100	Perhaps, but there is no mention in the study.

TVC for Zanzibar SNV, VSO, ZATI, 2010 Schrempp, 2010 Streck, n.d.		to lift the quality in products and hospitality, and resolve policy issues.  PPI reaches 7% from accommodation sector, 47% from independent restaurants, 18.8% from tourism activities and 27% from the retail sector. Interventions to lift the SPPT include the development of SMEs, and the improvement of linkages to generate more employment opportunities.	Not particularly.	MIL, 18% of safaris per year in the Northern Circuit.  The overall PPI generated through direct tourism linkages is only 10%. Thus, PPI reaches \$17US MIL.	A brief note on the Maasai people.
<b>Uruguay</b>  Technical assistance for the design of production and employment MINTURD, 2010 UN Uruguay / ONUDI	TVCA - to assist policy-making to enhance local sustainability towards local production, and to generate employment.	The development of an strategic tourism plan for 2009-2020, including: (1) a sustainable model, (2) quality and competitiveness, (3) employment generation, (4) marketing and promotion, and (5) social inclusion.	The sustainable tourism model, includes actions for the preservation of the natural resources and the use of environmentally-sound technologies.	Not particularly.	No.
<b>Vietnam</b>  Case study of the TVCA in Da Nang Mitchell & Le Chi Puc, 2007 Shoen, 2008 Mesoparner/ODI/GTZ	VCA, rapid participatory LED, PACA methods and ValueLinks manual, carried in Da Nang to generate employment and lift poverty income.	Recommendations suggested development of beach resorts to attract more tourists, to have a bigger impact on the local community.	Recommendations on the inclusion of enabling the environment programs to improve the business environment.	It was estimated that poor people attained 27% of the tourism revenue at the destination.	No.

### **3.7 Tourism Value Chains Conclusion of Relevance to this Study**

Chapter three has described and reviewed the value chain, the purpose and the emergence of the so-called tourism value chain as an approach, drawing on the methods and findings of existing studies. The chapter addressed how tourism value chains provide various possibilities to promote social and economic development. A number of case studies that employed the value chain in the context of tourism were analysed, as well as the characteristics and impacts of their various differing methodologies. By surveying and analysing these studies, as the most important research in the literature covering case studies finalised to date, it was possible to draw on the findings of these analyses to identify challenges in the tourism value chain, its implementation as an approach and its utility in identifying barriers to local participation within the supply chains. Findings of this analysis also highlight that tourism value chains are essential for developing countries; and that these studies can demonstrate how the participation of the local community in the value chain can contribute to the achievement of poverty reduction objectives for more sustainable development.

For instance, most of these TVC methodologies have been changed, tailored or further developed in order to reinforce or create strategies and plans to combat poverty in the destinations where it is studied. Therefore, it can be concluded that the tourism value chain analysis can and does function as a mechanism for poverty reduction, and to develop sustainable frameworks that address economic, social and environmental challenges in an integrated manner; while also improving the economic outcomes of tourism. This said, environmental sustainability as is acknowledged in most case studies that were reviewed within the literature, does not seem to be a priority among the current tourism value chain analysis conducted. Only Conservation International's projects seemed to have focused in developing long and lasting approaches aimed to safeguard environmental and conservation outcomes.

Additionally, the methodologies and tools reviewed in this chapter seem to have suffered constant adaptations and changes due to diverse factors that can be based on the destination or the organisation's needs. For example, in some projects the TRPR nine step approach only carried out seven; and in others, the six key

steps in value chain programme design only carried out five, which is the case of the TVCA in the Himalayas (SNV, 2010). Another example is the project carried out in Sri Lanka (Richter, 2006b), which followed its own approach based on the GIZ and ITC methodologies. However, their study of tourism value chains has been limited, paying more attention to the activities in the production industry such as agriculture, fishing and other product-related chains.

## **CHAPTER FOUR - Methods Selected to Assess the Ecotourism Project**

### **4.1. Introduction**

This chapter explains the research methodology used in this thesis. It begins with the research philosophy that reflects the choice of methods. Then, it provides an overview of the research design, including the research philosophy and approach, and explains the methodological strategies that guided the study. With regards the research design, Section 4.4 explains why the researcher decided to use a mixed methods design, including both qualitative and quantitative methods, as well in a case study approach. The chapter also provides an initial description of the TVCA methodology, as the central methodology in this thesis, building on the extensive review of literature in the previous chapter, which explained the value chain methodologies applied to tourism and their outcomes in various case studies on the ground. In this chapter, it is summarised how the researcher designed key methods found in those reviews, assembling the eight steps of the tourism value chain analysis as guidelines for the collection of the data, and the construction of the case study, and why these particular guidelines are selected to answer the research questions.

Section 4.5 presents the data collection strategies that were used to obtain the data needed for the case study evaluation, ranging from secondary data gathering strategies (e.g. review of academic sources, international organisations and government institutions) to primary data gathering tools, which were chosen carefully in light of the study's needs and suitability with a focus on the tourism value chain analysis and the case study approach. It explains the vital importance of each tool when collecting data. Section 4.6 explores preparatory measures taken when initiating the field work, beginning by describing the research team that carried out the fieldwork. It explains how the study addresses ethical considerations, such as anonymity and confidentiality, as well as how the 'consent to use voice recorder' was obtained. As such, the chapter covers methods of data collection and the course of action taken, starting with the pilot study and ending with a description of how the researcher addressed compilation of the data and issues such as language translation. Section 4.7 also deals with limitations and issues that arose in the field,

while Section 4.8 establishes the reliability and validity considerations of the study.

The overall objective of this chapter is to share the research methods, approach, philosophy and procedures that were developed for this study, explaining the guidelines that were constructed based on analysis of the literature, including other case studies on similar issues, in order to provide a better understanding of the fieldwork surroundings, the methodology chosen, and the conditions in which the data was collected.

## **4.2 Research Philosophy**

In the context of research, the philosophy establishes the view in which the data is to be collected. Of course, many different methodologies can answer different research questions. However, each research should be based on a carefully considered methodological choice that reflects the researcher's theoretical perspective, taking the logic and criteria of the circumstances to be studied into account. Thus, in order to choose the proper method for the present research, there are explicit assumptions to be considered such as ontology and epistemology. As stated by Crotty (1998, p.66): "different ways of viewing the world shape different ways of researching the world."

As noted by Saunders et al. (2007), a research process onion has four philosophical positions: positivism, realism, interpretivism and pragmatism. However, as Crotty (1998; and Goodson and Philimore, 2004) have explained, there are two particularly relevant epistemological positions in the context of social research; constructivism that is connected to the interpretative paradigm and objectivism that is connected to the positivist paradigm. The philosophy of the present study reflects interpretivist principles in order to develop knowledge within the field, in which the researcher analysed the data in an interpretative manner.

Consequently, interpretivism is the most reliable approach regarding the research philosophy for the present investigation. The study explores the perceptions of individuals in certain circumstances within a case and it requires the researcher to interpret the data collected and other components at every phase of the study (Radnor, 2001 and Myers, 2008). As the investigator develops and carries

out the data collection process through semi-structures interviews, field notes and observations, this interpretation occurs. The main advantages of interpretivism is that it can incorporate and integrate a range of diverse methodological tools, which assists in validating trustworthy data. On the other hand, its main disadvantage, as noted by Punch (2005), is that in some cases it will be challenging and complicated for the researcher, particularly in processing disparate and fragmented aspects of knowledge into a coherent story, while also remaining objective, especially recognising that the investigation process itself may influence the conditions and knowledge levels of those being studied. As the context of this study is rooted primary on the interpretation of perceptions of the Hñahñu members of the community of El Alberto, about the use of ecotourism to reduce poverty and to increase their livelihood opportunities and enforce environmental sustainability at their community.

#### **4.3. Research Design**

The overall design and plans adopted in the current investigation, provide the foundations for the selection of the research methods. Just as the research problem and objectives conduct the research into a certain path, an adequate research design will lead the research process towards answering the research questions in a robust and meaningful way.

The core methodological approach chosen in this research is to map the TVC framework in the ecotourism projects of a Hñahñu community of Mexico, identifying leakages and linkages of the ecotourism suppliers. In order to achieve this, the study uses TVCA, supported by a case study design and a mixed methods approach. These strategies allow the study to be both exploratory and descriptive in nature. Therefore, the selection of the research design is directly linked to the characteristics of its unique problems and aims.

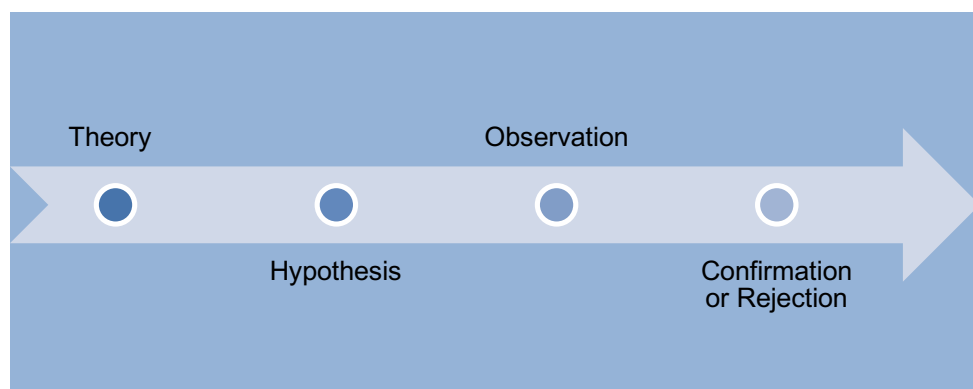


### 4.3.1 Deductive Approach

A research approach is typically divided into two different categories: inductive and deductive. These are perspectives that reflect their own procedures to collect data and develop concepts (Yin, 2011). Positivist studies generally follow a deductive approach, while studies of phenomenology frequently follow an inductive approach (Crowther and Lancaster, 2008; Ghauri and Grøhaug, 2005 in Wilson, 2013). Wilson (2013, p.13) stated, “a deductive approach is concerned with developing a hypothesis based on existing theory, and then designing a research strategy to test the hypotheses.” In comparison, as Yin (2011) argues, following a deductive approach can also be right for qualitative studies, depending on its needs and whether the approach can answer the research questions. Thus, a deductive approach can also fulfil the requirements of a study by using quantitative and qualitative methods as well as the positivism and inductive philosophies. In addition, as Yin (2011) recognises, the association of qualitative methods with either inductive or deductive theories and concepts can be beneficial.

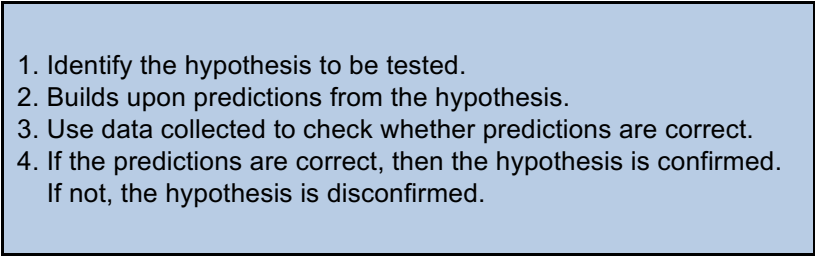
According to many authors in the context of research approaches (e.g. Crowther and Lancaster, 2008; Snider and Lamer, 2009; and Dudovskly, 2013), it is recommended for studies based on a deductive approach to take the following approach (see figure below).

**Figure 24 Deductive Process**



Source: Crowther and Lanncaster, 2008; Snieder and Lamer, 2009; Dudovsky, 2013

**Figure 25. Deductive Process Description**

- 
1. Identify the hypothesis to be tested.
  2. Builds upon predictions from the hypothesis.
  3. Use data collected to check whether predictions are correct.
  4. If the predictions are correct, then the hypothesis is confirmed.  
If not, the hypothesis is disconfirmed.

Source: Lau and Chan, 2014

Figure 25 outlines in brief statements the implications of the deductive approach on the ground. In addition, as Yin (2010) has recognised, the deductive approach has many advantages, to guide the researcher from the confusion of the initial data collection stage during the fieldwork, a fundamental factor for researching chaotic TVC. Furthermore, in the current research project, the theory to be tested is already present in other case studies and literature, this allows the investigator to seek out certain patterns, rather than to wait for these patterns to appear. Hence, the researcher makes use of the data to reanalyse theories previously recognised. Furthermore, a deductive research develops or deduces a conceptual framework and then tests the data gathered through empirical observation “reasoning from the general to the particular” (Pelisser, 2008, p.3).

Consequently, the current research project incorporates a deductive approach which is appropriate since the research is evaluated by the TVCA which is an existing theory, and it is to be tested throughout the research process in order to confirm or reject the hypothesis.

## **4.4 Research Methods**

### **4.4.1 Mixed Method: Qualitative and Quantitative**

Mixed method is a research design which uses both qualitative and quantitative methods, permitting both types of beliefs and mechanisms in the research. By adopting both methods, it is easier to review and carry on both types of data without limitations, however, it may be the case that even embracing both types of studies the research may tend to incline towards one of them, and just rely on the other method to collect or analyse the data that one cannot do by itself (Creswell and Plano Clark in Creswell, 2007; Pavelek, 2013). This flexibility, in terms of its suitability for the specific study adopted, is the main reason for the researcher to choose mixed methods, to be able to obtain all the data needed by using a diverse selection of tools. In addition, the selection of mixed methods as a strategy is key for the purpose of the research. For example, when collecting surveys and also using case study methods, the use of triangulation is needed to increase the reliability of the findings. This recognised, it is understood that in a community (the indigenous community) with diverse views, embedded within a society based on very different values and practices (Mexican dominant society, and the international and domestic guests themselves), it is also practical for the researcher to apply various techniques to her investigation in order to have the chance for greater accuracy (Pavelek, 2013; Yin 2009).

The justification for selecting a mixed methods approach for the present thesis has been argued in numerous studies in journal articles and books of tourism and case studies (Burgess, 1993; Creswell and Plano Clark, 2007). Nevertheless, it should be noted here that the benefits of adopting qualitative and quantitative data together for the present investigation include the following elements:

- It will help to improve the validity of the results, permitting the researcher to examine the circumstances from various points of view, such as triangulation or numeric tendencies from quantitative research and the data from the qualitative research.
- Collect statistical, quantitative data from the indigenous peoples sample and then carry on with interviews with key informants in order to explore the outcomes properly.

- Depending on their circumstances, stakeholders are likely to have separate needs and concerns; mixed methods permit the researcher to identify better trends and voices of the indigenous peoples, government and non-government organisations.
- To get the best from both data collection resources, by including qualitative and quantitative research, or depending on the case, it may be that just one approach may describe or understand the situation.

Adapted from: Burgess, 1993; Guba and Lincoln, 1994; Finn et al., 2000; O'Cathain Murphy and Nicholl, 2007; Creswell, 2006; 2009; Cameron, 2010.

Indeed, according to Pavelek (2013) quantitative and qualitative methods need to be seen as complementary methods, not as opposites, given that they represent different paradigms to achieve the same objective.

On one hand, quantitative research is a technique normally used in order to evaluate theories by analysing situations among measurable elements (Pavelek, 2013). Additionally, quantitative research comprises close-ended collection tools that have the flexibility to use the different types of participants; however, it is unable to provide descriptions or to review answers and examples. Due to this, quantitative approach would possibly fail, if applied as a single method in the context of the present research (Creswell, 2006; Cameron, 2011; Pavelek, 2013). On the other hand, qualitative research analyses circumstances within an ordinary situation, besides is an effort analyse subjectively attitude and behaviour of the participants (Lonwhorn, 2007 in Pavelek, 2013). In other words, qualitative research can manage information regarding participants and conditions in a straightforward manner; moreover, this data cannot be generalised since the samples are small and different (Creswell, 2006; Cameron, 2011; Pavelek, 2013). In consequence, for the interests of this research, the strengths of one complement the weaknesses of the other.

Taking these factors into account, in this study qualitative and quantitative information are presented in different segments, however, the interpretation and analysis integrates both types of information in order to obtain a wider convergence on the finding. The mixed methods structure may not look as clear when establishing the differences of each method as it could if the researcher were using a single method processes. For instance, the intent is to analyse the tourism value chain (TVC) in the indigenous ecotourism venture at El Alberto Hidalgo, Mexico. Surveys and questionnaires were helpful to measure the relationship between TVC

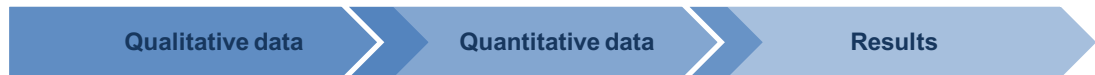
activity and the participation and benefits that indigenous peoples obtain from it. In addition, the tourism value chain analysis (TVCA) was conducted by using case study techniques such as semi-structured interviews and observation among indigenous peoples in each destination. These methods were combined, or ‘mixed’.

Figure 26. Three ways of Mixing Qualitative and Quantitative Data

**Merge the data:**



**Connect the data:**



**Embed the data:**



Source: adapted from Creswell, 2006

The logic for merging quantitative and qualitative methods in the current study is to increase the level of understanding within the context of the research problem and fill the gaps that arose in the field (Burgess, 1993; Pavelek, 2003; Creswell, 2009).

Nevertheless, it is recognised that every type of research methodology, whether qualitative or quantitative, has its limitations. Ever since the concept of mixed methods arose, there have been strong discussions on their incorporation (Burgess, 1993; Agerfalk, 2013). According to Pavelek (2003), it is essential to reflect how the research can succeed when combining both methods and constraints to the research.

Mixed method research also poses challenges for the inquirer, for example, the selection of both methods also required extensive data collection in both forms;

text and numeric, it is time consuming to fully analyse the data. In consequence, it was important for the researcher to practice and obtain training in dealing with numeric and text research (Creswell, 2009; 2010; Cameron, 2011). As stated by Burges (1993) "there is not 'best' method of conducting a particular investigation. Instead researchers need to consider the kind of research question they wish to pose and the most appropriate techniques of data collection. There is a range of different styles." Thus, the researcher chose her research techniques based on the suitability of the process towards the research questions and problems, additionally, the researcher openly recognises the advantages of combining methods and how to use this in favour of the investigation by complementing one with the other, when targeting the research problem (Burgess, 1993; Creswell, 2006; 2009; Cameron, 2011).

#### **4.4.2 Triangulation**

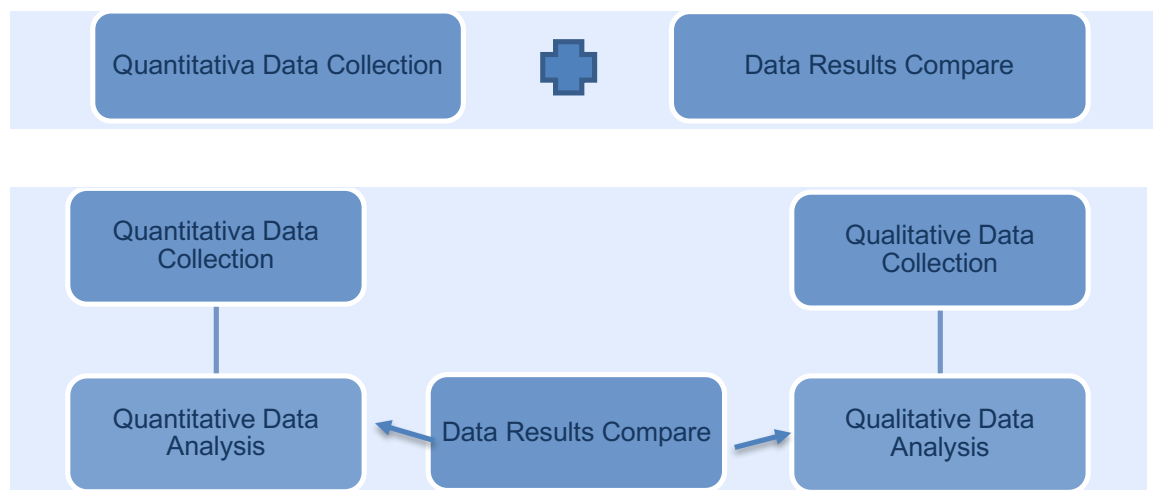
Triangulation is a mechanism that employs various research methods in order to seek for a more in-depth perception of the issues to be resolved (Denzin, 2012). According to Flink the "objective reality can never be captured", therefore "triangulation is not a tool or a strategy of validation with the objective to attempt, but an alternative to validation" (Flink, 2007 in Denzin, 2012 p.82). For instance, Yin (2008) acknowledges that in case studies there is a wider range of variables of interest rather than data points. Yet, this particular characteristic allows case studies to use diverse sources of evidence, also requires the use and analysis of triangulation as a validation strategy.

#### **Concurrent triangulation strategy**

A concurrent triangulation strategy allows the investigator to gather data in two stages, meaning that qualitative and quantitative data is collected simultaneously and even though the importance between the methods could be uniform, the research can be inclined to one side (Terrell, 2012). Furthermore, the two databases should be combined through the interpretation stage in which strengths and weaknesses of the research will be brought out, and will follow an

analysis or discussion. In addition, concurrent triangulation strategy's main objective is to corroborate and cross-validate the databases of the research. Its biggest asset is that it dismisses the fragility of one approach by using two approaches. On the other hand, the discrepancies that would emerge in the interpretation stage would be difficult to handle while balancing two forms of data (Terrell, 2012). In other words, a concurrent triangulation approach is expected to help the researcher to crosscheck the findings to ensure consistency by the combination of various methods to study the same case. However, considering that a single method would not be able to achieve the aims and objectives of this study, different aspects of empirical reality, multiple methods of observation must be involved.

Figure 27. Concurrent Triangulation Strategy



Source: adapted from Terrell, 2012

The process of this research combine the data collected through interviews, questionnaires, observations and field notes, this is followed by documentation analysis, interpretation of findings and discussions. Subsequently, triangulation involves the comparison of qualitative data collected from observant, semi-structured interviews with indigenous peoples, owners, managers and employees of the ecotourism ventures, governmental and NGOs involved within the TVC with quantitative data in different stages of the TVC of SMEs surveys and questionnaires

applied to the rest of the indigenous people that does not participate among the tourism industries and other pertinent information that may arise on the field. Furthermore, as often seen in published mixed method studies, this side-by-side integration follows by an analytical discussion that provides a statistical analysis complemented by plenty of field citations to increase the validity of the quantitative findings.

However, the concurrent triangulation approach has also been criticised because the model has several restrictions (Denzin, 2012). For instance, it demands more time than a single method and some level of knowledge for the researcher to drive the investigation in both paths without losing its direction (Guion et al., 2011). Nevertheless, the investigator fully understands that by employing this double method, the process of finding inconsistencies within the data collected may not be straightforward, but it will rather represent a challenge to comprehend the same piece of information from different perspectives (Patton, 1990; Creswell, 2009). In addition, several authors (Denzin, 1987 cited in Jennings, 2001; Patton, 1990; Creswell, 2009; Yin, 2012) agree that a triangulation is continuously employed within the methodology because there is no solitary method that guarantees the reliability of the data gathered. Consequently, there is a need to employ multiple methods in order to provide cross-data validity findings within the investigation.



#### **4.4.3 Case Study Approach**

A case study is one of many methods to use in order to complete an investigation. Yin (2009), argues that there are three key conditions to take into account in order to decide what method to use: first, the type of research question; second, whether the researcher might have or might not have control over the affairs that are to be studied and; third, whether the study is within a contemporary context or if it looks into historical situations. In other words, case study is considered the best-suited method for the study of contemporary real-life circumstances that cannot be manipulated by the researcher. The current research study adopted a case study as a research strategy for this thesis.

Further, this method is used when investigating circumstances that can contribute to the increase or/and development of the knowledge of a group, individual or/and organisation that might be political or social (Yin, 2009). Hence, the need to follow a case study occurs when the researcher desires to comprehend a socially complex phenomena happening in diverse circumstances, given that the case study enables researchers to retain the holistic and significant variables of real-life situations, for example, individual life cycles, the behaviour of small groups, as well as organisational processes, performances and relations (Yin, 2009). Churchill and Sanders (2007), Creswell (2009), and Yin (2009, 2012) have demonstrated that the case study's most important strengths are its capability to use various types of collection tools and the way that it manages to analyse larger amounts of data collected in different styles. These are not limited by the use of certain collection tools as other research methods are. Many authors similarly consider that this approach is one of the most resilient methods, as it can put together various types of analysis into one case, by using different data collection techniques, like interviews, questionnaires, surveys and observations are in its nature (Gillham, 2000; Veal, 2006; Yin, 2009; 2012). Therefore, the use of quantitative and qualitative data, gathered for this investigation project, is supported by the nature of the case study methods.

To make sure that the case study is the adequate method to use in the study, the researcher must fully understand the strengths and limitations of a case study approach (later described in the limitations section), as well its implications for other types of research. Therefore, the purpose of the research is to investigate the

benefits and impacts that ecotourism could have in the indigenous communities of Latin America by analysing and comparing the findings of the TVCA from data collected during the fieldwork. This was carried in two indigenous communities in Hidalgo, Mexico. To complement the TVCA, a case study is the most appropriate research method as it “involves empirical investigations of a particular contemporary phenomenon within its real life context using multiple sources of evidence” (Robson, 2002 in Sanders, 2009).

Furthermore, case studies also embrace the study of “individuals or groups”, which can be identified in the context of the study as an organisation and indigenous peoples; “in single or multiple cases for evidence or range of different evidences to answer specific research questions” (Gillham, 2000) which will be particularly useful in the data gathering for the TVCA. As discussed in chapter one, this study contains research questions starting with ‘what’ and ‘how’, which define the case study as both exploratory and descriptive. Another greater advantage of its application in the present study, is that this research approach can succeed in situations where even the tourism resources are limited. Thus, based on the existing literature and the data gathered during fieldwork, the researcher identified that the study of indigenous peoples and communities in developing countries presented many gaps towards reliable information or of any information at all, in some cases. Fortunately, case studies can deal with these types of circumstances by using multiple and diverse variables of interest based on a wide range of different evidence rather than just relying on data points (Veal, 2006).

As the paper “Building theories for cases study research” (Eisenhardt, 1989) explains, it is possible to define the case study method and deliver a process for the development of theory from the case study research, in order to explain the procedure of theory structure with the case studies. The study does this in a systematic way which compares theory building with case studies to hypothesis testing research. As Eisenhardt defines, there are eight steps of doing case study approach. These have been used in this study but adapted to the thesis’ purposes. In particular, this research process and activities within the case study embraces seven steps based on Eisenhardt’s process of building theories from case study research which was originally based on eight steps. This work of Eisenhardt is quite dated, but continues to be present among case study literature and practice.

Table 4, below, illustrates the process of the investigation based on Eisenhardt's (1989) process of building theories from case study research, although the step 'Shaping of the hypotheses' was not included in the current case study, because it addresses the construction of measurements, which are not part of this tourism value chain case study.

Table 5. Process of Case Study Research based on Eisenhardt's

Eisenhardt's steps	Case study activity	Reason
1. Getting started	Defining the case study objectives for the TVCA (see part 4.3.4).	Focuses efforts; gives a better understanding of purpose of the study.
2. Selecting the case study	Selecting the case study throughout surveys of literature (secondary data see 4.5.1) and non-probability purposive sample.	Retains theoretical flexibility; constraints extraneous variation; and prepares to sharpen external validity.
3. Crafting instruments and protocols	Recruiting volunteers for the research team (see part 4.5.1); sorting multiple data collection methods to employ (qualitative and quantitative data combined); and protocols for carrying interviews and questionnaires.	Strengthens grounding of theory by triangulation of evidence; synergistic view of evidence; fosters divergent perspectives; and strengthens grounding.
4. Entering the field	Primary data gathering through multiple data collection methods semi-structure interviews, survey questionnaires, observation and field notes (see part 4.4.6 and 4.4.7); purposive or judgmental sampling (4.4.5).	Speeds analysis and reveals helpful adjustment to data collection; allows the researcher to select attentively each participant to maximise the productivity and resources.
5. Analysing data	Examining data following the 8-step guideline to map and analyse the tourism value chain (see part 4.3.4); Using multiple data collection methods and validation techniques to maximise reliability (see parts 4.3.1 and 4.3.2).	Gets familiar with data and preliminary theory generation; forces the researcher to look beyond initial impressions and see evidence through multiple lenses.
6. Enfolded literature	In this step the researcher examines the juxtaposition of the literature reviewed (in chapter 2 and 3) with trends, and concepts and that surfaced from the TVCA.	Builds internal validity, raises theoretical level, and sharpens definitions.
7. Reaching closure	Following the saturation criteria (4.5.1) the researcher determines when the team has gathered enough and relevant information, and to declare the fieldwork completed.	Ends process when marginal improvement becomes small.

Source: based on Eisenhardt (1989, p.533)

#### 4.4.4 Tourism Value Chain Analysis (TVCA)

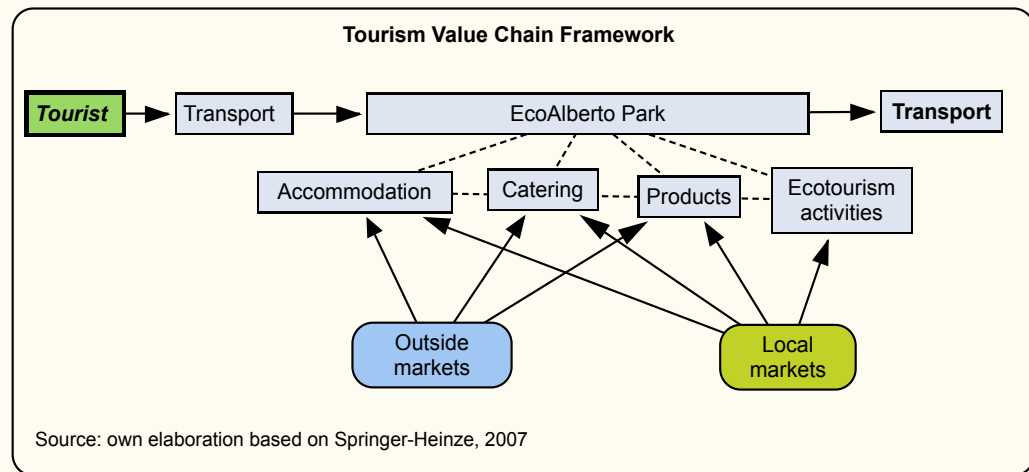
The TVCA is a development approach that links actors in tourism separately to add value to products and services as they pass from link to link through the whole tourism chain (Kaplinsky and Morris, 2001). The use of the TVCA can enhance the productivity of small and individual local businesses and their operations, and generate positive changes in social aspects like proffering benefits at the local community e.g. poverty reduction, gender equality, employment generation, environmental sustainability, economic growth, et cetera. For indigenous peoples who are facing serious poverty challenges among other social issues, especially in rural natural areas, ecotourism is one of the viable sources of employment and revenue creation. Ecotourism can be used to employ direct and indirect groups of vulnerable indigenous peoples, and engage them into local participation through SMEs and individual businesses, including the informal sector. On that note, there are substantial reasons where the use of a TVCA can improve opportunities so indigenous groups can participate within the economic activity, in an efficient and sustainable way.

#### Approach Rationale

The tourism value chain analysis is the right approach to this investigation for the following reasons:

**First, the TVCA maps main nodes and actors that contribute or provide benefit within the ecotourism activity.** The TVCA can easily recognise how and where to create value among ecotourism services and activities. In this investigation, the opportunity of creating new services and upgrading particular products can generate more revenues, secure the competitiveness of the ecotourism company and create more participation for the Hñahñu people. Moreover, it also identifies the process by which revenues are obtained, and how they reach the local economy and benefit indigenous peoples. This can be verified by tracking micro enterprises and individual businesses that participate within the tourism supply chain and analysing the findings.

Figure 32 Tourism Value Chain Framework



**Second, the TVC framework facilitates the recognition of main nodes and actors among the ecotourism process.** The TVCA relies on its framework, the layout easily identifies the main nodes and actors within the ecotourism activity. The framework also helps to establish clear links between the ecotourism company and suppliers, while providing recommendations for possible interventions that can generate a positive impact at the local community. Figure 31 illustrates the TVC simple framework of the main ecotourism process on the case studied in this thesis.

**Third, the TVCA is complemented by case-study methodologies and the data collection tools chosen to gathered information.** The TVCA involves an assessment of the results and these can be forward-looking, case studies and suitable data collection tools such as: semi-structured interviews, survey questionnaires, field notes and participant observation. Hence, the use of mixed methods is likely to complement better the TVCA. On the basis of the present study, the TVC approach used a series of interviews and survey questionnaires guides to obtain information depending on the role of the participants, for instance EcoAlberto's managers or personnel, micro and individual businesses, governmental and development organisations, local authorities, travel agencies, and other sources following the main ecotourism process.

**Fourth, a TVCA can result in win-win-win for tourists, the ecotourism company and the local businesses.** According to earlier reviews on TVC and value chain literature and fieldwork, the researcher considered that a tourism value chain that has been analysed and improved can make 'the' difference. Moreover, the literature reviewed also suggests that by strengthening linkages between companies and suppliers involved (directly or indirectly) in the ecotourism activity, normally results on mutual beneficial relationships. In consequence, the implementation of the TVCA can result in a win-win-win strategy for the tourist, the ecotourism venture and local businesses involved in ecotourism activity. For example, by upgrading or creating new links within the tourism chain, the tourist can have a more enjoyable tourism experience with more efficient and effective access to the services, while the local community benefits by playing a part in the chain either directly or indirectly. Therefore, the TVC results not only in benefits to the people employed in tourism sector, but also for all those around it.

Figure 29. Advantages and Disadvantages of the Tourism Value Chain Analysis

**Advantages:**

- A well-structured TVC is able to reduce costs, and to determinate the failure or success of a company.
- TVCA is easier to validate and complement with information gathered from key informants.
- TVCA generates efficient service, products, competitive advantage and innovation.
- TVCA links ecotourism companies and suppliers to have produce quality services or product.
- The TVCA framework facilitate the data gathering process by mapping the TVC step by step.
- TVCA encourages suppliers to achieve sustainability objectives.

**Disadvantages:**

- Easy to get caught up in the complexity of value chain mapping, statistics, etc., and lose track of the study's objectives.
- It can be time consuming and expensive as most in-depth studies are. It is therefore important to keep the final goal in mind, and to limit analysis to what is needed to achieve that goal.

Adapted from: Kaplinsky and Morris, 2001; Springer-Heinze, 2007; and Van den Berg et al., 2012.

**Fifth, a TVCA can be tailored to address the specific needs of this study and focus on its specific objectives.** The study of the tourism value chain can be done by analysing the main sources that contribute or benefit the ecotourism company to achieve particular objectives. In this case, the approach combines the strengths of the tourism value chain analysis to follow the revenue stream of ecotourism products and services purchased at EcoAlberto or directly at the local community. Moreover, the tourism value chain analysis estimates how EcoAlberto distributes its benefits from the tourism expenditure among its own operations. Nonetheless, the analysis focuses on the process of the EcoAlberto's tourism chain and suppliers from the local community. It does this by becoming familiar with the main process of the tourism value chain, and by carefully locating who participates in the chain and where they participate. It helps the researcher to recognise where the resources are allocated through the supply chain among tourism products and services.

### **Objectives of the Tourism Value Chain Analysis**

The objective of the TVCA in the present study is to respond three questions, where is implicit that the employment of ecotourism is a mean for environmental sustainability.

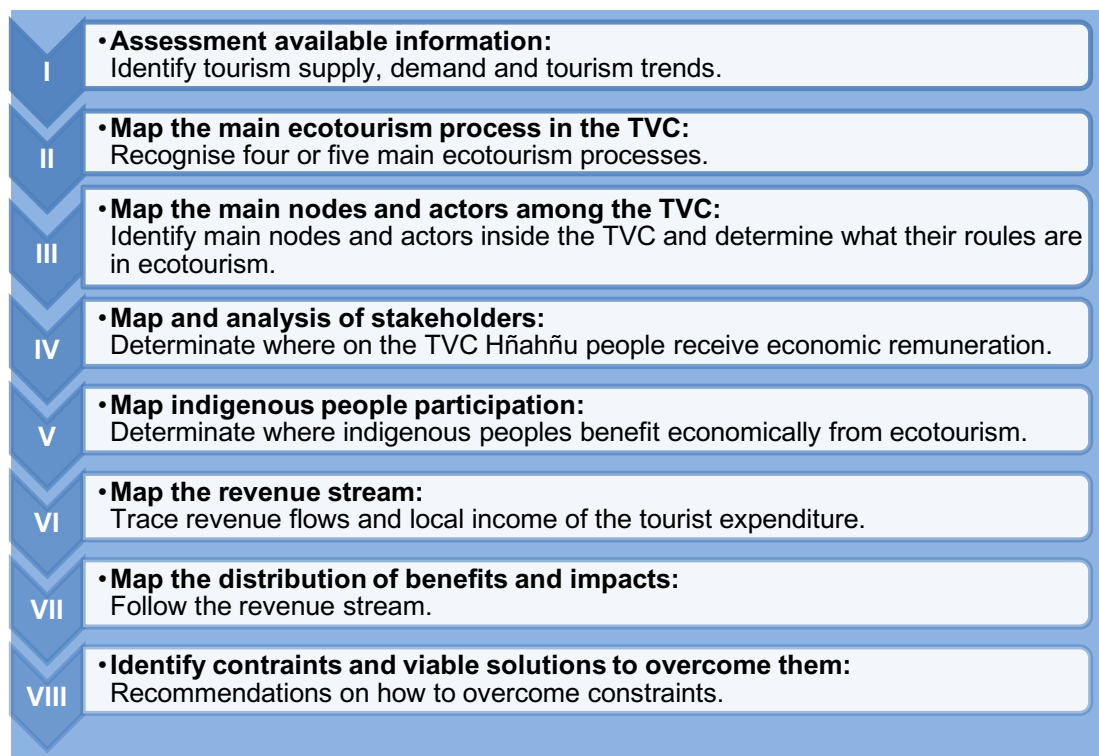
1. What are the financial and non-financial impacts that the ecotourism brings to the local community?
2. Does the Hñahñu ecotourism company distribute and adequately share revenues to the local community?
3. Is the Hñahñu ecotourism company financially viable?

### **Guidelines for the Tourism Value Chain Analysis**

The approach to program design presented in this paper is comprised of eight steps (see figure 30). Step one provides an assessment of the available information of the ecotourism venture to prepare the ground for the TVC mapping. Step two, three and four, map and analyse the TVC; obtaining a substantial understanding of the actors and their roles throughout a stakeholder analysis. Step five, six and seven map the share of the tourist expenditure i.e. revenue stream and

the distribution of benefits, identifying where tourists spend their money, where indigenous people participate and what share of the revenues reaches the local community. Step eight examines constraints and opportunities to TVC actors e.g. barriers to their participation, growth and/or competitiveness; and offers viable solutions to those constraints through recommendations and the development a conceptual framework.

Figure 30. Guidelines for the Tourism Value Chain Analysis – 8 - Steps



Source: Adapted from Kaplinsky and Morris, 2001; Springer-Heinze, 2007; Ashley et al., 2009a; Van Den Berg et al., 2012.

Therefore, the guidelines employed for the analysis of the TVC were adapted by the researcher based on the combination of key methodologies on the subject. These methodologies were found through an extensive analysis of case studies and literature on tourism, ecotourism and value chain development. Each approach has particular advantages on how to analyse a value chain in the tourism sector, however, none of the approaches per se accomplished the objectives of the present investigation. For instance, many of these methodologies have been employed in case-studies that followed the PPT approaches, different from the approach that was adapted for the present study. The reason is, PPT focuses on tourism to benefit



poor people in general, there is no preference for a group, while this study focuses on providing benefits to poor, but particularly to poor indigenous peoples, who live linked with their cultural and ecological habitat. A further reason for the differentiation is that PPT generalises when referring to tourism types, to put it in other words, PPT studies all kinds of tourism, the only requirement is to benefit the poor; it can be ecotourism, but it can also involve mass tourism (which indeed, is the most popular research subject for PPT). In contrast, this study focuses on alternative tourism that aims to protect the natural environment, such as sustainable tourism and ecotourism.

Based on the analysis and literature discussed above, the researcher mixed these methodologies to develop a closer approach, one that included suitable perspectives and the opportunity to present insights specific for this case study. The present guidelines were based on the following studies: The *'Evaluating Ecotourism as 'A Handbook for Value Chain Research'* (Kaplinsky and Morris, 2001); *'ValueLinks Manual: The Methodology of Value Chain Promotion'* (Springer-Heinze, 2007); *'Community and Economic Development Strategy'* (EplerWood, 2004); *'The Tourism-Led Poverty Reduction Programme: Opportunity Study Guidelines'* (Ashley et al., 2009a); *'Tourism and Local Development: An Introductory Guide'* (Ashley et al., 2009b); and *'Making Value Chains Work Better for the Poor: A Toolkit for Practitioners of Value Chain Analysis'* (Van den Berg et al., 2012).

## **Guidelines for the Tourism Value Chain Analysis – 8-Steps**

### **I. Assess the available information**

Identify the tourism supply and demand mapping out the following:

- (1) Tourism supply: products, services, activities, attractions and infrastructure.
- (2) Tourism demand: arrivals, length of stay, seasonality, type of tourists markets and expenditure.
- (3) Tourism trends: Poverty, migration and ecotourism; governance (e.g. policies and institutions); community participation in ecotourism; barriers and constraints.

### **II. Map the main ecotourism process in the TVC**

Recognise four or five main ecotourism processes at El Alberto and map them out,

then create a list of possible tourism itineraries depending on the tourist's choices and circumstances when visiting EcoAlberto.

### **III. Map the main nodes and actors among the TVC**

Identify main nodes and actors inside the tourism value chain and determine what their roles are in ecotourism. Follow the four or five main ecotourism process identified in the previous step, and classify actors according to their principal activity.

### **IV. Map and analyse the stakeholders**

With the help of the volunteers, team and key informants, identify those relevant actors among the tourism value chain and categorise them logically into groups according to interests and the stakes they may hold from the ecotourism activity.

### **V. Map the economic participation of Hñahñu people along the TVC**

Determine where on the tourism value chain Hñahñu people receive economic remuneration for their work (including out of pocket expenses), list them into categories to determine how much they earn. Recognise key factors that can enhance or limit these earnings.

\*Note: do not include the Hñahñu personnel carrying out community service at EcoAlberto, unless they have another source of income.

### **VI. Map the revenue stream**

Trace the revenue flows and local income of the tourist expenditure including out of pocket expenses such as tips and snacks. (1) Identify 'where' and 'how' the tourist spends the money and then follow that trail; (2) estimate the revenues of EcoAlberto's employees, micro business such as artisans, crafts makers, local stores, stall and street sellers, food traders, etc.

### **VII. Map the distribution of benefits and impacts**

Following the revenue stream, identify the portion of tourist expenditure that remains at the destination, how it is distributed between services providers, particularly what share of the revenues is provided to the local community by the ecotourism company. (1) Assess whether EcoAlberto distributes an adequate share of financial and non-financial benefits to the local community.

#### **VIII. Identify constraints and viable solutions to overcome them**

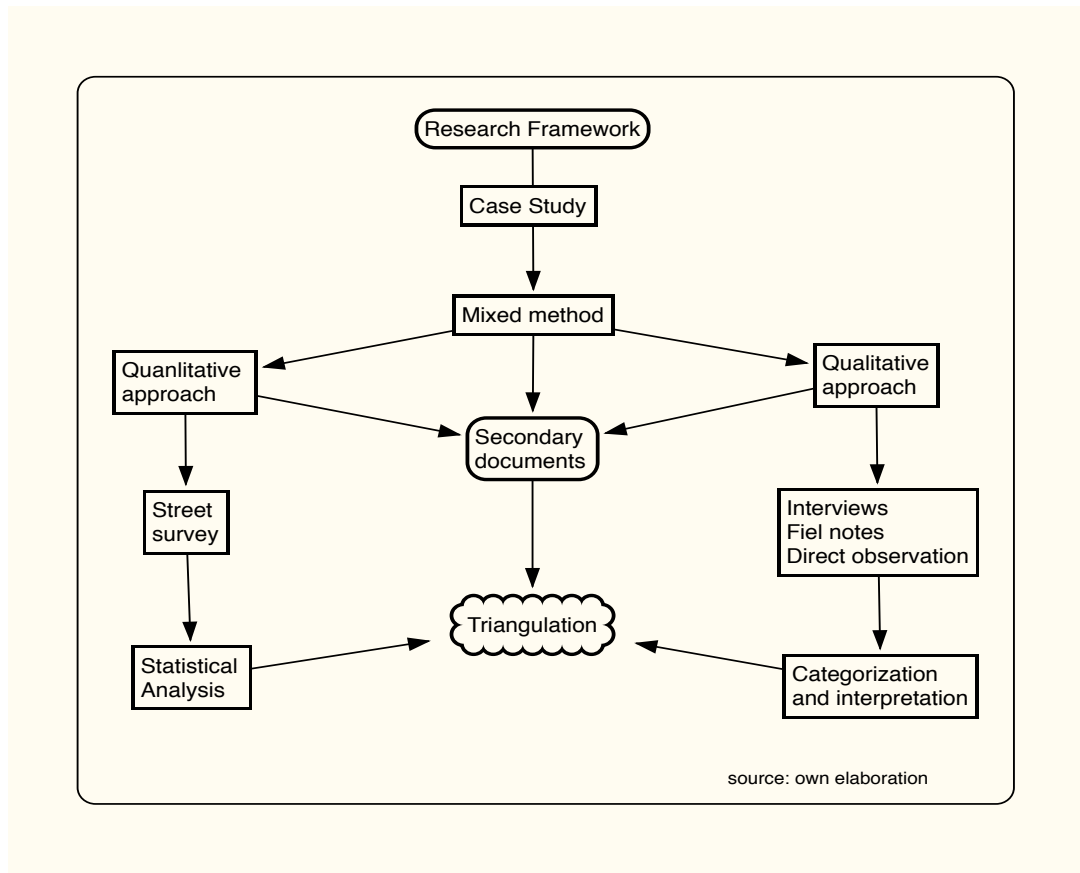
Constraints have been identified along the previous 7 steps, based on previous maps (1) generate a list of 'where' and 'how' to improve participants on the tourism value chain (e.g. which node or activity); (2) develop the criteria for recommendations or possible interventions including actions and factors (e.g. critical issues, action points, risks).

### **4.5 Data Collection Strategies**

The present study uses different forms of data collection approaches and techniques. In the case of the ecotourism venture managers and employees, and governmental and non-governmental organisations (key participants), the data collection approach includes direct observation and semi-structured interviews. Those same tools were also used to gather information among stakeholders and indigenous members of the communities where the ecotourism projects are established. In addition, the use of surveys including questionnaires were needed, since they were designed to include employees of the ecotourism ventures, tourists, and indigenous peoples, who were not able to participate in the interviews. Hence, surveys were used as a complementary method. These data collection strategy is of high importance give the nature of the TVCA, which requires different types of data such as social and economic backgrounds of the indigenous communities and the ecotourism projects.

Nonetheless, one of the advantages of a mixed method approach is that it can strongly contribute to increase the validity of the study. However, the implementation of techniques recognises the intent to produce a better perception of the motives within the research (Creswell, 2006; Yin, 2009; Rubio and Varas, 2011; Denzin, 2012; Pavelek, 2013). If the research uses qualitative and quantitative methods, these can corroborate results. According to Denzin (2012), the corroboration of findings by the implementation of mixture of methods, is also known as triangulation.

**Figure 31. Research Framework**



#### **4.5.1 Secondary Data Gathering**

Secondary data uses current information in order to seek the answer of the questions that the research has asked (Long-Surehall et al., 2010), put it in other words, the researcher was not involved in collecting that data, because it has already been analysed, it is existing data ready to be analysed and adapted to purpose e.g. published articles and statistics (Russell, 2001). In addition, as Long-Surehall (2010) suggests, the accessibility of this data is uncomplicated and straightforward, but usually limited to the consent of the producers through publication. The present study uses secondary data obtained from a wide range of sources such as journal articles, academic books, trustworthy websites, governmental and NGO publications. The sources analysed proved to be useful to establish the background and current situation of the case studied. Information on sustainable development and ecotourism trends have been obtained from official websites and documents constantly in order to keep the data up to date. For

instance, several NGOs and UN official websites offer publications on the field of sustainable development and tourism (e.g. conventions, treaties, statistics, plans and policies) have provided very useful sources. On the other hand, information and statistics (in particular) in the context of poverty, illegal migration and indigenous people from the Mexican governmental authorities and organisations were very general, many lacked up to date or particularised information that would have been more useful.

#### **4.5.2 Primary Data Gathering**

Primary data was gathered the local community investigated and with sources including visitors at the destination and local authorities, government and development organisations and travel agencies. The study employed semi-structured interviews collected from key informants such as local authorities, governmental institutions and development organisations<sup>6</sup>, managers of EcoAlberto among other stakeholders. Local authorities provided also some secondary data and background information of El Alberto and the Mezquital Valley region. EcoAlberto's managers, the committee of the women cooperative and other individual businesses facilitated information about their operations e.g. type of products and services offered, prices, numbers of personnel, production, commercial partners (traders), forthcoming projects and their role in the sustainable development of the local community. Furthermore, EcoAlberto's managers provided information about their work in the community, such as the distribution of benefits which according to them is important for the sustainability of the communities. The emphasis on the information provided by EcoAlberto's managers was estimated information on tourism arrival numbers and revenues obtained from the activities, services and products offered, and EcoAlberto's involvement with the development of projects at the local community e.g. schools, clinics, housing, sanitation, public transport, et cetera.

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<sup>6</sup> Data collected from governmental institutions, development organisations, other than statistics, publications or data that has already been analysed, such as perceptions are considered primary data.

### 4.5.3 Semi-structured Interviews

Semi-structure interviews are verbal interactions between the interviewer and the interviewee, where the interviewer seeks to obtain information from the interviewee, by engaging him/her in interesting discussions to answer the questions (Longhurst, 2010). In addition, these methods are a mixture of unstructured and structured interviews that mostly rely on open-ended questions no matter the sequence (Pearsons, 2008; Longhurts, 2012). Similarly, a semi-structured approach was chosen because interviews can be used with both quantitative and qualitative methods as it is in the case of this research. Thus, by employing these interviews combined with other qualitative methods, it allowed the researcher to identify different perceptions from the Hñahñu people since the interviews were more like informal conversations (Longhurts, 2012; De Clerk et al., 2011). However, some authors argue that the production of different outcomes may reduce the viability of the study. Nevertheless, the present investigation complements semi-structure interviews with other quantitative and qualitative tools (e.g. survey questionnaires, field notes, observations, etc.) for more reliable results. Indeed, the use of mixed method can counterbalance the weakness of semi-structure interviews and turn it into an advantage.

The reasoning to employ this tool within the study is the flexibility it has to produce valuable data and a broad understanding of the views and opinions from different participants such as Hñahñu employees, managers or stakeholders. Moreover, this data collection tool was essential during fieldwork (2013, 2014), particularly because the semi-structure approach of the interview allows the participant, in this case Hñahñu people, to share what is important for them, the free of speech allowed by this approach, helped strengthen the relationship researcher - participant. Therefore, semi-structured interviews were not only employed to give a voice to the Hñahñu people, but to use that voice accurately to share their perspectives and insights regarding their situation, as well as issues that concerned them.

## Key Informants

Key informant is a term used for particular people who have high knowledge and first-hand information on the subject area or territory as well as social legitimacy and credibility (Rubio, 1997). A key informant interview is an efficient tool which allows the researcher to acquire a clear understanding of the context studied in order to resolve the problems of the investigation, this tool forms part of the qualitative strategy (Parsons, 2008).

In the case of the present investigation, key informants were highly valuable throughout the entire research process, especially in early stages. As a result, efficient in-depth knowledge was generated, further, this knowledge assisted to identify leading trends and variables that settled the path for the rest of the study.

Table 5. List of Key Informants - Fieldwork 2013 and 2014

Description	No. of Informants	Vicinity	Gender
Managers (EcoAlberto)	2	El Alberto	Male
Community service personnel (EcoAlberto)	2	El Alberto	Male and female
Ixmiquilpan City Council	1	Ixmiquilpan	Female
National Commission for the Development of Indigenous Villages (CDI)	2	Ixmiquilpan and Mexico City	Male and female
Artisan	1	El Alberto	Female

Source: author's elaboration based on data obtained from fieldwork 2013, 2014

Table 5 (above) shows a small list of imperative subjects whose proficiency and willingness provided crucial data to fulfil a great part of the fieldwork objectives. Furthermore, these informants are also recognised as part of the key ecotourism stakeholders.

## **Interview Protocol**

The present interview protocol outlines the procedure and research methods used when the interviews were conducted during fieldwork.

### **Prior to the interviews, the research team:**

- Identified participants and essential background about them (by using the significance criteria and the purposive sampling approach).
- Developed a list of questions and adapted to each group of participants (e.g. managers, employees, ecotourists, business owners), some of these questions are included in this interview protocol.
- Agreed with participants on a date and time for the interview.
- Agreed on small initial meetings (20-30 min.), for the researcher to brief volunteers regarding the focus of the interviews with a particular set of participants (e.g. employees, food traders), and to determinate what aims were to be achieved.

### **During the interviews, the research team:**

#### **Introducing the team (5-15 min.)**

- Acknowledged participants for taking the time to respond the questions.
- Introduced the facilitator (the researcher herself and/or the volunteers).
- Provided background information of the study.
- Explained the focus of the interviews and possible discussions depending the category of the participants (e.g. managers, employers, ecotourists and business owners).
- In addition, the researcher took notes (a.k.a. field notes) through the interviews.
- Followed-up questions depending on the leading circumstances.



### **Informed and asked for participation consent:**

- Provided the participant information sheets to all potential respondents, the participant information sheet included the following key points:
  - Purpose of the research.
  - Data collected is anonymous and confidential.
  - Participants who agree to participate can decide not to answer questions they do not wish to.
  - Participants can withdraw from the research at any time.
  - Participants can reject to have their voice recorded or/and not to appear in pictures.
  - The details (e.g. telephone, email) of the researcher to reach her if further doubts.
- Participants that agreed to participate, were given a participant consent form to sign, and the researcher team ensured that:
  - Participants confirmed that they read and understood the key points of the participant information sheet (described above).
  - Some participants provided their signatures on the participant's consent form and kept a copy, others just gave verbal consent.

### **Confirm permission to use voice recording**

- The research team asked verbally for permission to use voice recorder.
- Interviews or any other data recorded is anonymous and confidential.
- The names were changed on the transcripts, the researcher used a different name, but kept the accurate age and economic activity.

### **Interview script (2–3 min.)**

- Verbal introduction: the research team introduced themselves to the participants, and explained the purpose of the research. Example of the verbal introduction:

“Good morning (afternoon), my name is Dalia Lara, I am a PhD researcher at Anglia Ruskin University and I am currently investigating the benefits and impacts of the development of ecotourism projects in indigenous communities of Mexico. The reason why I contacted you is because you are part of the personnel of the ecotourism venture EcoAlberto and/or a resident of the Hñahñu community of El Alberto. Before you decide if you would like to participate, it is important for you to understand why this research is being done and what involves. Thus, the study proposes to explore the potential of ecotourism to support sustainable development that benefit ecosystems and indigenous communities by analysing EcoAlberto as a case study and by carrying out a tourism value chain analysis, to put it in other words, this is mainly interviewing people involved within the tourism activity in your community (El Alberto). As a result, a conceptual framework i.e. a plan of these results will be developed. This plan will contain recommendations on how to improve your productivity and effectiveness, while being sustainable, and to assist ecotourism practices and policies that might be relevant to your community as well as other indigenous communities in Mexico and Latin America.

The questionnaire survey takes around 5-10 minutes while the interview may take 30-40 minutes approximately. It is intended as an opportunity for you to express your views on the matter.

This interview/questionnaire is anonymous and confidential.”

Semi-structured interviews or the handouts of questionnaires followed.

### **Pilot questions**

1. Do you belong to any indigenous culture?
2. Does the ecotourism activity benefit the local community? How?
3. Do you personally benefit from the tourism activity? How?
4. Does anybody else from your household's benefits from the tourism activity?
5. Do you believe that the local community in general benefits from the tourism attracted by the ecotourism venture?
6. Has the tourism activity or the ecotourism venture contributed to the expansion of local business opportunities?
7. Are ecotourism business and employment opportunities reaching new segments of the population?
8. Does the tourism activity or/and the ecotourism venture generate jobs for women and the young?
9. Have the prices of goods and/or food risen due to the tourism activity?
10. Has the tourism activity or/and the ecotourism venture helped towards the development of new services and infrastructure (e.g. schools, houses, clinics) in the local community?
11. Have collective community benefits been enhanced?
12. Has ecotourism contributed to improve the livelihood of indigenous people especially those living in poverty?
13. What are the social and cultural impacts of ecotourism?
14. Has the delinquency increased due to the tourism activity?
15. Has the behaviour of the community members changed due to the tourism activity (e.g. dress code, type of food, languages)?
16. Has the tourism activity harm the natural environment?
17. Has the tourism activity helped to increase the creation of more cultural activities, handicrafts, artisan goods?
18. Does the tourism or the ecotourism venture use resources that local people need (e.g. water, wood, electricity)?
19. Does the local community have any control over tourism (e.g. development of plans and/or policies)?
20. Does the money spent by the tourists remains in the local community or does it go somewhere else?
21. Can residents visit the touristic facilities?
22. Do the residents receive any type of training (e.g. conservation, nature, ecology, workshops, skills) through the ecotourism venture?
24. Are the local people participating in conservation programs in their community?
25. Do you want more or less tourism in your community or area?
26. Are there any issues of related to ecotourism in your community?
28. What can be done so the tourism activity benefits more the local community (in your own opinion)?

30. What is your age (and gender)?
31. How many members conform your household?
33. How long have you been living there?
34. Where did you live before? Have you ever migrated to the U.S.?
35. Are you currently working? (If yes, please specify)
37. How many days a week do you work and how much do you earn (per week)?
38. Do you have any other comments about the ecotourism venture or the tourism activity?

- After the interview the research team:

- Thanked the interviewees for they help and time.
- Developed a contextual framework of trends from with notes taken during interviews.
- Save recordings into the database.
- Transcribed recordings.
- Edited and translated transcripts from Spanish to English.
- Identified if there was any information missing, if there was, recognise possible points of action to gain additional information.
- Developed a short list for follow-up questions and arrange with the relevant participants to collect the answers by email, telephone or face-to-face (depending on the case).
- Registered all the information in an accurate manner. Interview, questionnaires, and notes were put into the databased, sorted by dates, trends, situations, events, key participants, etc.
- Uploaded recordings, transcripts and notes into dropbox and backed-up all information.

#### 4.5.4 Survey Questionnaires

Survey questionnaires were an important element for the data gathered during the field research in 2013 and 2014. As suggested by Veal (2006) and Ryan (2001) the questionnaires are built on sets of questions to collect information from respondents (Ryan, 2001). This research collected data by conducting two survey questionnaires. The questionnaires were composed from a theoretical framework based on issues that arose from the literature, secondary data and the background of the El Alberto. The objective of the questionnaires was based on the logic that it was not possible to interview a larger sample of the population, even though the Hñahñu community is relatively small.

The two different questionnaires were slightly different from one another (see Appendix A), tailored with questions depending their role within the tourism activity; whether they were part of EcoAlberto's personal, members of the Hñahñu community or tourists. For instance, the surveys had questions regarding their involvement within EcoAlberto or concerning the tourism activity in general; perceptions of the impacts that tourism development brought to the local community, and other simple questions such as sustainable, economic, political and social issues. Additionally, the questionnaires were constructed with open-ended and pre-coded/close questions in Spanish; the first, was used to obtain critical and personal opinions, it assisted identifying particular perceptions and attitudes of the respondents; the second, was employed to obtain quantitative data making the analysis is quicker and very straightforward (Veal, 2006). Furthermore, the results of the survey questionnaires were combined with interviews face-to-face, field notes and observations.

#### Questionnaire Development

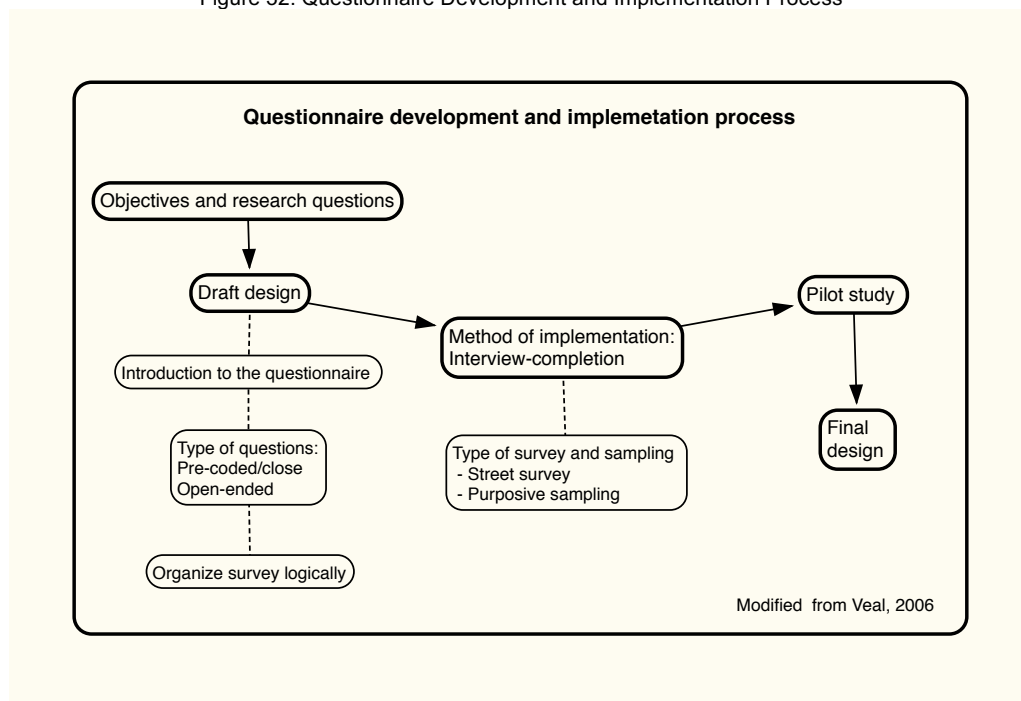
The present investigation developed and implemented the survey questionnaires based on the following steps.

1. **Introduction.** Each questionnaire has a brief introduction, that included the propose of the investigation, the researcher's contact details, and the time in

which the questionnaire is expected to be completed among other things.

2. **Wording of questions.** Surveys used open-ended and pre-coded/closed questions. The first type aimed to get a wider perception of the trends and issues, it looked for more details within the answers, and allowed the researcher to see a bigger picture; the second type offered various answers, the options were generally in tick boxes.
3. **Organisation of the questionnaires.** The questionnaires covered different topics, and as there were two different types of respondents (local people and tourists) each one was tailored according to the research objectives. For instance, the questionnaires were divided in different sections in order to be logical and easy to understand (e.g. economic, socio-cultural).
4. **Layout.** Surveys were designed in a straightforward manner, in other words, easy to read and to go through. For example, questionnaires had page numbers, clear and large fonts, and double spaced paragraphs.
5. **Simple questions.** To make sure that participants understood and responded the questions, the researcher used simple Spanish and avoided the use of difficult concepts and technicalities.
6. **Pilot study.** The researcher reviewed the findings of the pilot questionnaires to improve the surveys' accuracy.

Figure 32. Questionnaire Development and Implementation Process



## **Questionnaire Implementation**

### **Type of survey**

Respondents were targeted by using the street survey and following the purposive sampling. During the pilot study, the researcher recognised that participants were more likely to respond to surveys while they were out on the street, at the market, at convenience stores, working the land, selling food and handicrafts, etc.; rather than in their households; it seemed (and local volunteers confirmed) that when the locals were at home they wanted to rest and did not want to be bothered. The main concern of the researcher was that street surveys are normally short in nature, lasting no more than 5 minutes, however, to the researcher's surprise, locals agreed to 10-minute interviewer-completion surveys, and often these will be carried up to 15 minutes. On the other hand, tourists seemed more in a hurry to answer the surveys, and yet they took the time to give their responses. Therefore, the researcher avoided to target them while they were engaged in ecotourism activities (e.g. camping, hiking). Instead, tourists were asked to respond the surveys mostly outside EcoAlberto's parks, on the streets, at markets or buying souvenirs.

### **Method of implementation**

Interviewer-completion appeared to be more valid and reliable. On one hand, when the researcher used the respondent-completion method during the pilot study, participants left more questions unanswered or/and without clarification (in the case of open-ended questions). On the other hand, participants appeared even enthusiastic to answer the surveys when the researcher read the questions.

#### **4.5.5 Sample Technique and Criteria**

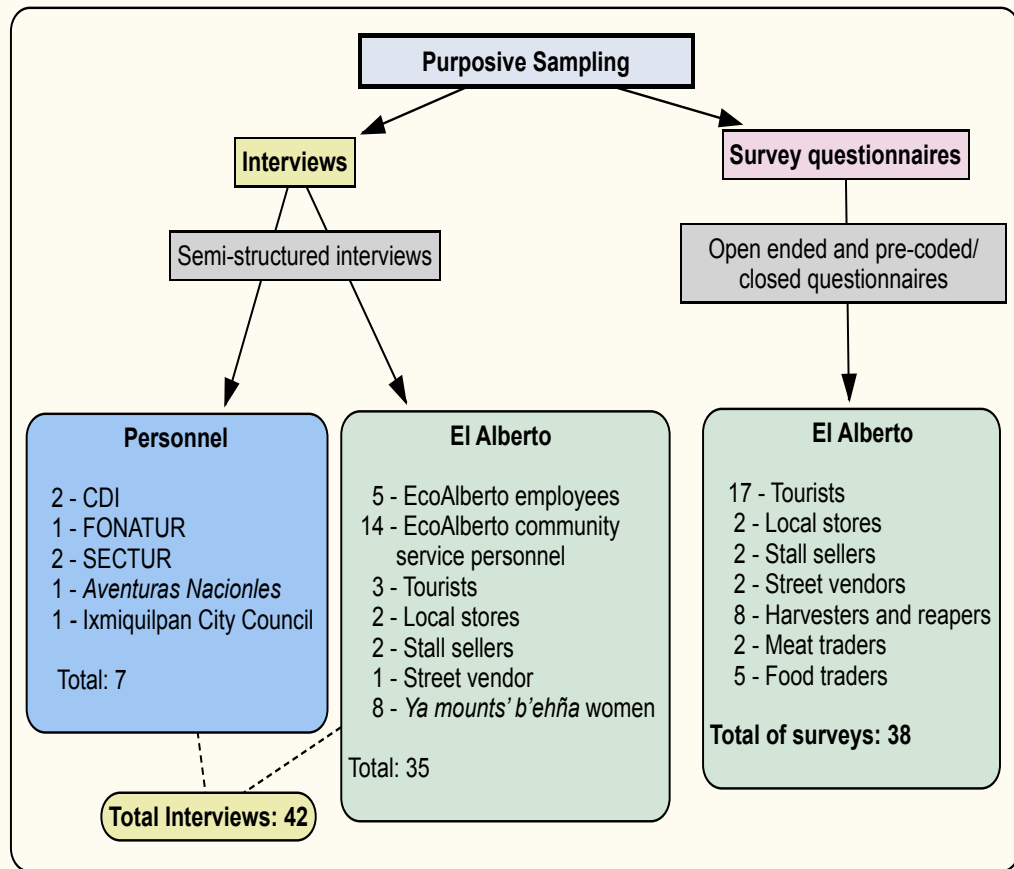
Sampling is recognised as the procedure in which a portion of the community is selected to take part in a study (Saunders, et al. 2009). In other words, sampling is known as a part of the population, designed by probability or non-probability approaches (Bryman, 2012). For instance, in the purpose of this research 'How many?' is not a matter in question, given that numbers *per se* are trivial. Instead, the research focuses on the understanding of the phenomenon, and whether the information collected provides enough data to evaluate the hypothesis with accuracy rather than looking for statistical validity. Therefore, for this investigation the significance criteria and purposive sample were the appropriate approach to enhance effectiveness and productivity while collecting data on a tight schedule. Consequently, the combination of the significance criteria and the purposive sampling on the ground of this study, assisted collecting data in an accurate and reliable manner.

#### **Purposive Sampling**

Purposive sampling is the technique chosen to identify the sample for the interviews and questionnaire survey in this investigation. Also known as judgmental sampling, this technique depends on the researcher's judgment to select cases (Saunders et al., 2009). These cases are selected attentively to maximise the productivity of resources (Patton, 2014). Therefore, the selection of the cases cannot be random and it cannot be considered as statistically representative. One of the main advantages is that the technique has been broadly implemented in fieldwork by researchers with small samples, but its main limitation lies on being a demanding time-consuming process (Denzin and Lincoln, 2005). Yet, in this investigation, purposive sampling enabled the researcher to identify participants that met the criteria established by the context of the study and research questions. Therefore, the sample of the subjects was based on their knowledge, participation and experience in ecotourism, sustainability and poverty issues at the Hñahñu community of El Alberto, in Hidalgo, Mexico (see figure 33).



**Figure 33 Sample Technique of the Research**



Source: own elaboration based on data obtained during fieldwork (2013 and 2014)

### **Saturation Criteria**

In relation to the project goals, it was necessary to capture ideas, made through specific remarks on the presence of peculiar elements within the ecotourism project and its surrounding activities, this was achieved through the gathering of direct testimonies of the Hñahñu people during the fieldwork. Moreover, the sampling technique employed on the interviews was selected to complement the purposive sampling according to the significance criteria. In this criteria it is advocate that the investigator develops the impression that there is no longer

anything new towards the objectives, thus once collected a number of interviews, the researcher acknowledges that it has reached level of saturation. Thus, during fieldwork and since qualitative part of the mixed method deals with non-probability criteria. Thus, the saturation criteria were implemented following the research objectives, consequently, when some particular response given by the indigenous peoples was perceived to be repeated, the selection of the sample was considered to be sufficient (Bryman, 2014). As a result, while it complemented the purposive sample, so while finding subjects based on their knowledge to find reliable subjects who had access to pivotal data such as EcoAlberto's manager and personnel, owners of micro enterprises and individual businesses, as well as employees of governmental and other NGOs involved in the ecotourism activity (e.g. development organisations, travel agencies, etc.). These subjects are known as key informants named like that because they have high knowledge and first-hand information on the subject area or territory as well as social legitimacy and credibility (Parsons, 2008) within their communities and/or organisations. The researcher further applied saturation criteria to determine when the participant reached a certain point, in which there was no longer good information or all the information required was collected.

Consequently, following the purposive sampling, the researcher interviewed and surveyed the following respondents as shown in figure 36. First, interviews were gathered with staff of some Mexican governmental organisations such as the National Commission for the Development of Indigenous Villages (CDI), National Fund for the Development of Tourism (FONATUR) and the Ministry of Tourism (SECTUR), then with local authorities from the Ixmiquilpan City Council and with a travel agency (*Aventuras Nacionales*) from Mexico City. Second, interviews carried out at El Alberto included: EcoAlberto's employees and community service personnel, tourists, owners from local convenience stores, stall and street vendors as well as independent artisans and handicrafter from the *Ya mounts'b'ehña* cooperative. Third, the street surveys gathered at El Alberto embraced: EcoAlberto community service personnel, tourists, owners from local convenience stores, stall and street vendors, harvesters and reapers, and food and meat traders.

## Group Characteristics

The data in table 6 indicates the a list of participants who participated in interviews and survey questionnaires carried during fieldwork in 2013 and 2014; these are: (1) government organisations or local authorities working on the tourism sector or/and supporting indigenous peoples; (2) Hñahñu members of El Alberto, men and women over the age of 18 involved in the tourism sector, and other economic activities such as food and handicraft suppliers (also considered key stakeholders); and (3) tourists or/and ecotourists, over 18 years-old, domestic and foreign, found around the at ecologic parks of EcoAlberto.

Table 6. Participants of Interviews and Surveys in 2013 – 2014

Participant	No. of participants	Male	Female	Data collection method	City/Community
Employees EcoAlberto	5	3	2	Interviews	El Alberto
Community service personnel EcoAlberto	14	11	3	Interviews	El Alberto
CDI	2	1	1	Interviews	Ixmiquilpan Mexico City
FONATUR	1	0	1	Interviews	Mexico City
SECTUR	2	1	1	Interviews	Mexico City
<i>Aventuras Nacionales</i>	1	1	0	Interviews	Mexico City
Ixmiquilpan City Council	1	0	1	Interviews	Ixmiquilpan
Local stores	4	0	4	2 interviews 2 surveys	El Alberto
Stall sellers	4	0	4	2 interviews 2 surveys	El Alberto
Street vendors	3	0	3	1 interviews 2 surveys	El Alberto
Harvesters and reapers	8	8	0	Surveys	El Alberto
Meat traders	2	2	0	Surveys	El Alberto
Food traders	5	4	1	Surveys	El Alberto
<i>Ya mounts'b'ehña</i> cooperative	8	0	8	Interviews	El Alberto
Tourists	20	12	8	3 interviews 17 surveys	El Alberto
Total	80	37	43	42 interview 38 surveys	

Source: author's elaboration based on data obtained from fieldwork (2013, 2014).

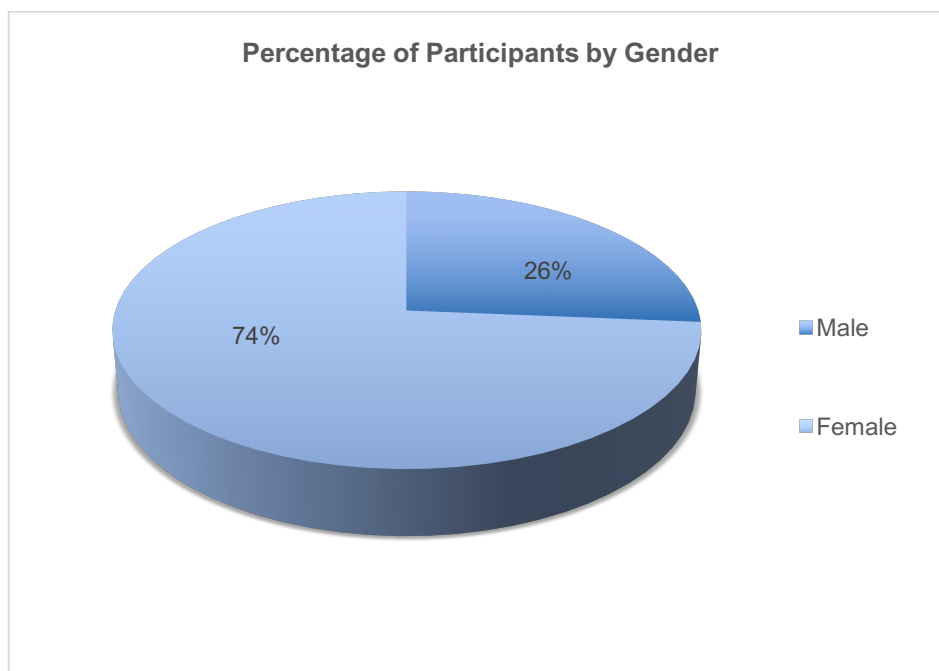
During the data collection a slightly higher percentage of female respondents was registered, as illustrated in table 7 and figure 34 these numbers include both methods; interviews and survey questionnaires.

Table 7. Percentage of Participants by Gender

PARTICIPANT	NUMBER	PERCENTAGE
Male	5	26%
Female	14	74%

Source: author's elaboration based on data obtained from fieldwork (2013, 2014)

Figure 34 Percentage of Participants by Gender



Source: researcher's elaboration based on data obtained from fieldwork (2013, 2014).

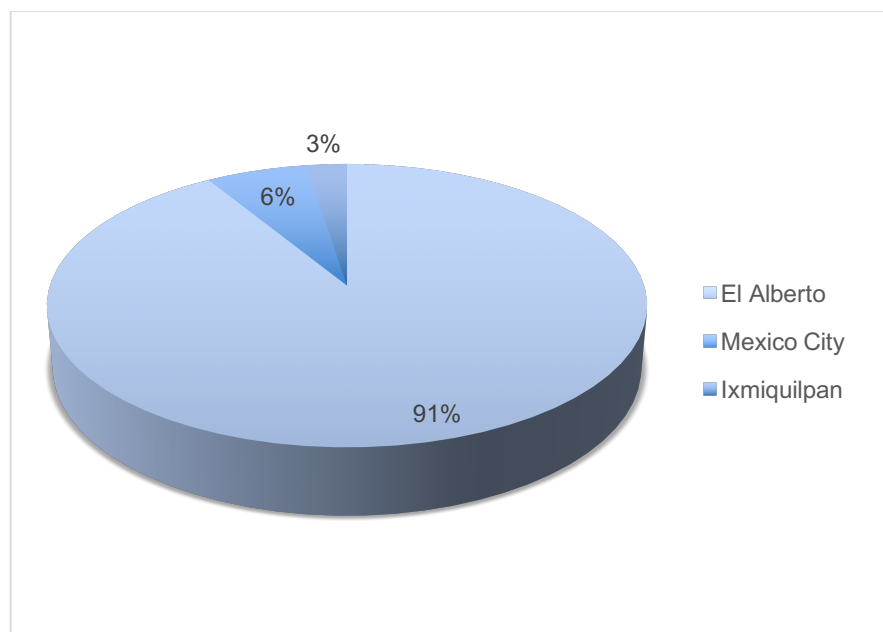
Similarly, the data was collected in three different locations (see table 8 and figure 35) 6% in governmental organisations and a travel agency in Mexico City; 3% with local authorities and organisations of the city of Ixmiquilpan and 91% in with residents of the Hñahñu community at El Alberto.

Table 8. Percentage of Participants by City or Community

CITY OR COMMUNITY	NO. OF PARTICIPANTS
El Alberto	73
Mexico City	5
Ixmiquilpan	2

Source: author's elaboration based on data obtained from fieldwork (2013, 2014)

Figure 35. Percentage of Participants by City or Community



Source: author's elaboration based on data obtained from fieldwork (2013, 2014)

As seen in the above table and graphics, the size of the sample was not selected on statistical criteria, the key to select the Hñahñu participants of El Alberto was their key significance regarding the objectives of the study. Therefore, these participants are not a representative sample of El Alberto's population, although, having a statistical sample would not have made a difference since the community of El Alberto does not have an accurate number of residents (due to the high rates of the community of back-and-forth illegal migration to the U.S.). Furthermore, the objectives and research questions of these investigation did not require to measure results in numbers, instead the researcher focused on in-depth study of small samples designated for a specific purpose, providing some estimated statistics along the way, but not depending on them to show the success of the fieldwork. On that account, this approach provided pivotal data that lead the researcher into the theoretical insights that answered all the questions for the case study.

#### **4.5.6 Direct Observation**

Direct observation is a qualitative tool that can be used when undertaking fieldwork. It assists in gathering information on individuals, physical environments, or/and real-word events (Yin, 2012). This method was included in this research in order to allow the investigator to engage within the social, cultural and natural surroundings by documenting the indigenous peoples' conducts and attitudes within their local settings. For this strategy observation the researcher was present to observe Hñahñu people in their habitats in order to interpret their actions. Observations also require the use of other qualitative tools such as, field notes and pictures (Taylor-Powell and Steel, 1996; DeWalt, et al., 2011; Yin, 2009, 2012; ).

The researcher used direct observation to acquire a certain level of open access to events happening on the life of Hñahñu people, figure 39 states some of the observations recorded by the researcher; later on the investigation these same observations supported many responses from the interviews and surveys. Thus, this investigation employed direct observation as a tool to validate and reinforce the triangulation process. Another strength of this method was the possibility to obtain different perceptions and insights of the interaction between the Hñahñu people that were not directly involved in the tourism activity and those who were, thus,

observation helped recognising issues and possible conflicts.

In consequence, direct observation was essential for the researcher who visited (with the research team) the Hñahñu community of El Alberto (in two different years and in various weeks at the time) to gather and corroborate information, interacting with the locals as a tourist and as a researcher, shopping at local stores and eating at local restaurants in order to recognise the surroundings.

Figure 36. Direct observation documents during fieldwork

1. Characteristics of the Hñahñu people: culture, traditions and beliefs.
2. Hñahñu behaviour with local and with tourists, and dress code.
3. Roles with in the community by gender.
4. Events that took place within fieldwork.
5. Physical surroundings of the local community: conditions of the infrastructure (e.g. houses, schools); and the natural resources (state of the ecotourism venture).
6. Working conditions and hours.
7. Issues with neighbouring communities over the ecotourism development.
8. Issues dealt at the community assembly.
9. Issues of the migration (to the U.S).
10. Functionality of the <i>Ejidal</i> System.

Source: author's elaboration based on data obtained during fieldwork (2013, 2014)

Hence, the potential for observation to contribute to the acquirement of new knowledge are unlimited. Further, the researcher's approach when she got involved in some conversations was to be respectful without really giving any opinions to the locals' statements, in order to remain unbiased throughout the entire investigation process.

### **Observing what does not happen**

Observing what does not happen is a precarious venture because it can take the observer to speculate about “what might have been” when such speculation may be off target. There are two conditions taken applied by the researcher into this investigation under which, it was appropriate and helpful to point out what did not occurred during field research at the Hñahñu community. As suggested by Laurier (2010) and Patton (2014) the researcher first, defined the goals, thus, designs and approaches, indicated that certain things ought to take place or were expected to, therefore, it was of high importance for the researcher to record what did not occur and to have access to those notes later when necessary (Patton, 2014). Second, it was appropriate to note something that did not occur when the researcher's knowledge and experience suggested the absence of some particular activity or factor that was particularly interesting. This previous statement clearly calls for the researcher's judgment, common sense and experience, this example of judgments are often among the most important contributions that the observer can create, as some result observations can contribute to the understanding of particular information which was not being considered before simply by omitting an activity (Patton, 2014).

#### **4.5.7 Field Notes**

“Note taking of some sort will be common to virtually every case study” (Yin, 2012 p.21). The reasoning for including field notes in the investigation is due to the nature of the fieldwork, observations were experienced and recognised in each stage of the data collection and taking notes was particularly helpful to keep track of important circumstances when analysing the TVC. Field notes are the foremost critical tool during fieldwork due to its concrete, and its detailed nature contains what has been observed (Rosman and Rallis, 2003). In this investigation the researcher kept the notes in a field journal which altogether with experiences and observations, by keeping a record, she came back to the journal when necessary during in order to revive the experiences and add situations not noticed before (Emerson, 1995).



Additionally, to increment the level of success of the field journal it was necessary to write down dates, places and descriptions of the affairs at the time (Rosman and Rallis, 2003). Probably the principal advantage of field notes within the present study is that these notes embraced the views of the Hñahñu people and their own voices or sayings through direct quotations. Moreover, field notes were included during the fieldwork when the researcher observed activities and during interviews, also with the aim to demonstrate authentic validation from the data, these note also played an important part during triangulation and cross-data examination. According to Fetterman (2010), field notes are accurate citations of the events witnessed on the field. This is also part of an emic perspective which refers to the researcher's sense of human behaviour and the perception what is real (Kottak, 2006).

Filed notes in this investigation also contain the observer's insights, interpretations, reactions to experiences, and reflections about what was happening in a determinate place and moment. Therefore, data collection was carried in an impartial way and with extreme caution, in order to avoid that the researcher's reflexions influenced the course of the results, since these perceptions are an essential part of the data (Rosman and Rallis, 2003; Kottak, 2006), besides, as argued by Patton (2014) if the information about what it is like for the observer is not recorded on the field notes, then much of the purpose is being there is lost.

## **4.6 Fieldwork**

### **Conducting Field Research**

The research undertaken at El Alberto had the objective to collect sufficient information to map the tourism value chain of the destination, to understand the policy and regulatory context that this fits within, and to understand the distribution for tourists' expending in the destination. The diagnosis will help to identify where the indigenous people participate currently, and evaluate where there are blockages or opportunities that could be addressed to enhance impacts on the local community.

### 4.6.1 Research Team and Language Translation

Research fieldwork can be conducted with many different types of teams. For instance, in Chapter Four the researcher reviewed various tourism value chain approaches which have been conducted by one, two, three or more researchers. The present investigation was conducted by three volunteers and the research leader. However, according to Ashley et al. (2009), every researcher has certain advantages and disadvantages depending on their skills or circumstances.

Table 9. Research Team Disadvantages and Advantages

Research Member	Disadvantage	Advantage
1 - Professional researcher <sup>7</sup> 1 - Researcher assistant	<ul style="list-style-type: none"> <li>▪ Lack of credibility</li> <li>▪ Lack of knowledge of the surroundings</li> </ul>	<ul style="list-style-type: none"> <li>- Good understanding of the study</li> <li>- Fluent in Spanish and English</li> <li>- Knowledge of ecotourism, sustainability, business management, etc.</li> </ul>
2 - Hñahñu local members	<ul style="list-style-type: none"> <li>▪ A few issues with coordination and communication</li> </ul>	<ul style="list-style-type: none"> <li>- Local credibility</li> <li>- Knowledge of issues and circumstances of the local community.</li> <li>- Access to the entire community and ecotourism parks.</li> <li>- Key stakeholder</li> </ul>

Source: adapted from Ashley et al., 2009

It is common for diagnostic investigations to be conducted by the interested team normally external with the assistance of locals, due to the complexity of the TVC (Ashley et al. 2009). The research team for this investigation was composed by one professional researcher and one assistant researcher both external, with knowledge in ecotourism, value chains, sustainability, business managers, poverty reduction, indigenous culture, etc., and both fluent in English and Spanish (table 9). The other members of the research team were two Hñahñu people from the community of El Alberto. These local volunteers are two respected members of the Hñahñu community (whose identities are confidential), assisting the leading researcher and assistant to gain access into the local routine and Hñahñu's trust.

<sup>7</sup> Research leader, main investigator.

Previous to engage in fieldwork, the researcher explained the scope of the study to the volunteers, to help them develop an awareness of the situation surrounding the investigation and to be familiar with the subject affairs, aims and research questions. Therefore, during the pilot study, the researcher and volunteers developed a clear idea of the data collection procedure.

During the first stage<sup>8</sup> of fieldwork, the researcher was accompanied by three volunteers. Two of the volunteers did not speak English, but they were from the local community. Volunteer #1 works as a teacher in the community of el Alberto and volunteer #2 works was doing his community service at EcoAlberto. They were primordial for the investigation, particularly for their deep knowledge of the area, their status among the Hñahñu community and their involvement in the ecotourism sector; as for volunteer #3, he is an external research assistant, his main contribution to the investigation was to assist transcribing interviews, survey questionnaires and recording from Spanish to English, or transcribing directly into English. Additionally, volunteer #3 assisted the lead researcher during the second stage<sup>9</sup> of the fieldwork as well. Furthermore, all information, briefings and data provided to the volunteers in meetings, as well as any other type of interaction between volunteers and researcher were always carried out in Spanish.

Figure 36 connects the assistance given by the three volunteers to the researcher while collecting data e.g. carrying out interviews and surveys. Volunteers #1 and #2 (in blue) recorded data collected into Spanish, while volunteer #3 and the researcher (in black) recorded the data in Spanish, and then they transcribed it into English. In addition, volunteer #3 assisted the researcher in translating the Spanish transcriptions made by volunteers #1 and #2 into English.

Furthermore, dealing with volunteers and language translation during the fieldwork had its challenges; this issues arose on the field. As curiosity is part of human nature, volunteers became interested in the study, therefore, one of the researcher's task was to explain and make sure that the volunteers were only transcribing and translating (in the case of the English speaker) the interviews exactly as they happened, in an impartial manner. This was a priority, since unbiased data is extremely valuable. To avoid any misinterpretations, the researcher

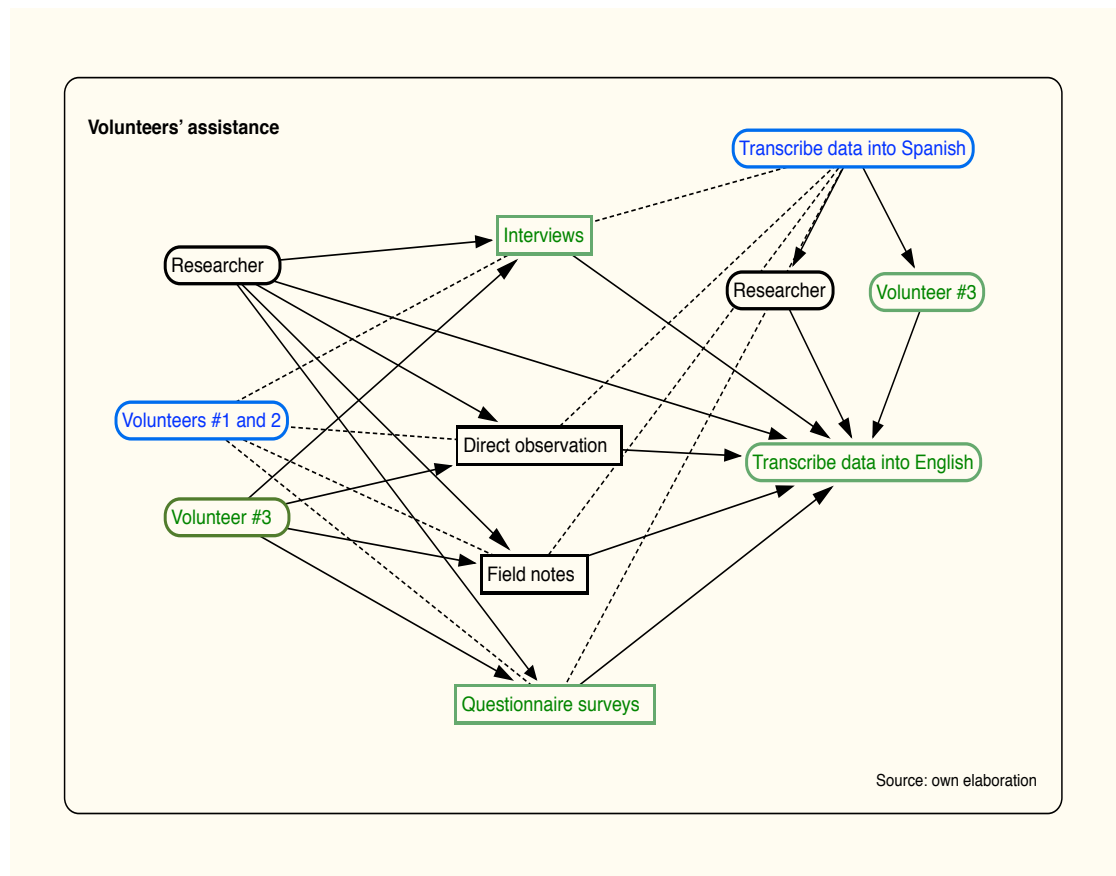
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<sup>8</sup> August - September 2013.

<sup>9</sup> August 2014

and volunteer #3 transcribed and translated sentence by sentence into small paragraphs of information. In addition, the researcher reviewed interview notes and recordings.

Figure 36. Volunteers' Assistance



#### 4.6.2 Ethical Considerations

When carrying a research investigation, it is of high importance that ethical considerations are well understood, and how the research may be affected by them (Polonski, 2004). According to Reskin (2011), ethics are “a method, procedure, or perspective for deciding how to act and for analysing complex problems and issues.” Therefore, it is the role of the researcher to consider if there is any risk in which the subjects can be exposed. The present research had a clear ethical approach, in the following paragraphs the procedure suggested by Ploski (2004) and Babbie (2007) was addressed throughout the research study.

First, to fulfil ethical considerations, prior to the interviews and survey questionnaires, the researcher briefed and debriefed subjects through a participant information form (see Appendix D), participants read the sheet and others asked an integrant of the research team to read it for them, in both cases participants kept the information sheet. Besides providing information of the study and its aims, the sheet also included the researcher's contact details e.g. email and local mobile, to reach her if participants had any doubts, or if they needed extra information about the study or the data collection tools (although, the tools used did not pose any physical or psychological risk). In addition, the researcher made sure that participants knew they could withdraw their information up to three weeks after the interview.

Second, in the case of the survey questionnaires, the fulfilment and the return of the questionnaire by the participants was assumed as consent. The initial paragraph of the survey questionnaire had the same use of a participation sheet, providing specific information about their role and participation on the study, the researchers details, et cetera. The consent form and survey questionnaire were given in Spanish. In the case of image taking (i.e. photos) the researcher asked for permission orally to each participant.

Third, in order to ensure, the participants' confidentiality and anonymity interviews and questionnaires in both cases were anonymous. In the case of the questionnaires, those were equipped with a unique tag in order to separate and distinguish between samples, (these did not include participant names). In the case of the interviews, some participants were given pseudonyms to use them when citing relevant quotations within the case study.

Forth, most of the photos taken during the field research did not contain full or recognisable faces, the researcher collected data under the philosophy that participants could be actively represented in their social environment without the need to display their faces on the camera, in some cases participants were not even in the photo. Inconsistently, with the previous statement, the researcher acceded to include recognisable photos as well, but this was only because participants were proud of themselves and what they have achieved in their local community, they were proud of being indigenous, they wanted to be included in their 'own' study, feel closer to the researcher, in fact participants asked to be included in photos.

### 4.6.3 Consent to use Voice Recorder

For the researcher, to obtain consent to use a voice recorder during the interviews was of high importance (Veal, 2006; Fisher, 2010) and it was one of the primary concerns of the data gathering process. The interviews were carried out individually and in groups, in order to obtain the consent from participants. First, the researcher and volunteers explained verbally (in Spanish) that the voice recording was completely voluntary and confidential. Second, assurances were given that the recordings will be only used as a backup during the transcription of the interviews and no one but the researcher team will have access to them, and what is more, these will be erased after a certain amount of time. Finally, the researcher and volunteers made clear that the recorder could be turned off at any time during the interview, in the case of group interviews, if one out of all participants did not want to be recorded then the recorder will be turned off. Consequently, most of the participants that were asked for the voice recording consent agreed to it, still, in few cases the participants preferred to leave some questions unanswered. Table 10 shows a list of the interviews recorded by the researcher during fieldwork 2013, these recordings lasted from 30 to 45 minutes approximately.

Table 10. Interviews recorded during Fieldwork 2013

Description	Gender
President (2 interviews)	Male
Secretary	Male
Community service	Female
Convenience store owner	Female
<i>Ya mounts' b'ehña</i> cooperative (8 - group interview)	Female

Source: author's elaboration based on data obtained from Fieldwork, 2013

#### 4.6.4 Pilot Study

The researcher and three volunteers undertook a pilot study in order to anticipate constraints that could arise during the main fieldwork. They explored the indigenous community of El Alberto, Ixmiquipan, Hidalgo in Mexico, for three days prior to start one month of fieldwork. Furthermore, the pilot study was gathered with the intention to test different features of the data collection procedure, the importance and the context of the questions, to recognise potential participants, evaluate possible areas and assess logistic issues, with the aim to prepare the ground and to make adjustments if necessary. Thus, the main fieldwork could be efficient and accurate. The study was conducted simultaneously in two parts (interviews and questionnaire survey) at the Hñahñu community of El Alberto; with seven participants in total<sup>10</sup>: one tour guide, two members of the community service of EcoAlberto, one artisan, one tourist and two residents.

In consequence, while conducting the pilot interviews and surveys, the researcher perceived that (1) having two local volunteers<sup>11</sup> in the team helped break trusting issues with the local community, the researcher believes that the assistance of the local volunteers was imperative for the success of the fieldwork<sup>12</sup>. (2) It was very helpful that at least one out the three volunteers was fluent in both languages (English-Spanish) in order to assist transcribing interviews. (3) Conversations with volunteers before going in to the communities were essential; it that was the time to brief the team, to develop a strategy or plan, to clarify what subjects to cover, the scope of the interviews and how many interviews to conduct as a minimum and maximum. The interviews used were semi-structured with open-ended and precoded/close questions (for surveys). The average length of the interviews was from 30 to 40 minutes, and for the surveys 10 to 15 minutes; these took place outside houses, in areas close to the roads or at their place of work (restaurant, shops, fields).

The pilot study also recognised questions that had to be rephrase, to make the questionnaire more comprehensive and questions that had to be incorporated as a result of issues that were not considered before. For instance, the first approach

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<sup>10</sup> For both interviews and surveys.

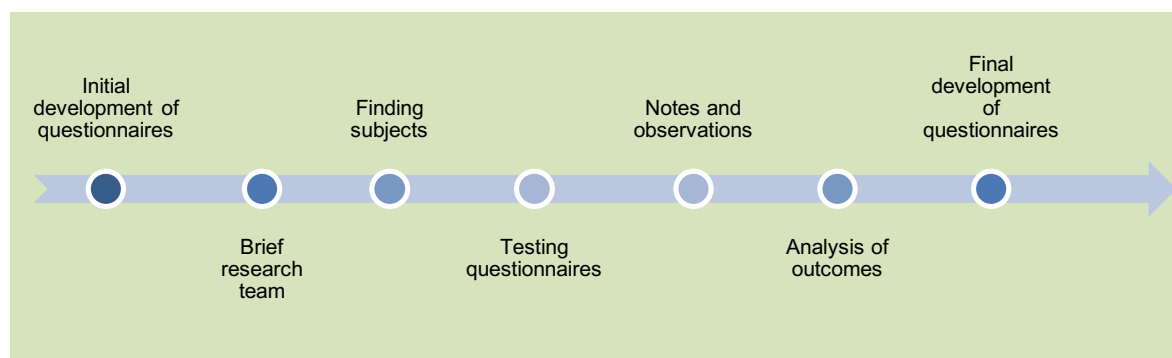
<sup>11</sup> One from El Alberto and one from a neighbouring community.

<sup>12</sup> The level of trust obtained through local volunteers, would not have been reached if all researchers were outsiders.

used to carry interviews and surveys had to be modified, when the researcher intended to carry most of the interviews individually, but most of the time when the researcher or any of the volunteers initiated a conversation to any Hñahñu resident, at least one or two people included themselves within the conversation, thus some of the one-to-one interview had to change to group interviews. Moreover, the research team also identified what issues or subjects that participants were less likely to be responded in public (e.g. wage income, migration, community service, etc.) so these were asked in private when possible.

Ergo, the outcomes from pre-testing questionnaires and interviews as well as observations and field notes also assisted to identify the key stakeholders and prospective participants. Another important function of the pilot study, as mentioned before, was to build trust with indigenous peoples in order to gather more accurate data, to familiarise with the surroundings and to establish networks to secure contacts. For instance, the researcher made initial contacts through a professor who helped her find two volunteers (one from each community) this allowed her to create other personal contacts through the local volunteers, which assisted with the unknown surroundings. Furthermore, the researcher and volunteers spent time walking around, visiting souvenir shops (e.g. artisan, handicraft) and even experiencing ecotourism activities (e.g. boat rides, trails through caves); in order to introduce themselves to as many people involved in the tourism sector as they could. While carrying out the pilot study, it started to come natural for the researcher to anticipate what type of situations may surround the data collection (e.g. interviews, questionnaires) and what kind of issues could arise.

**Figure 37. Pilot Study Process**



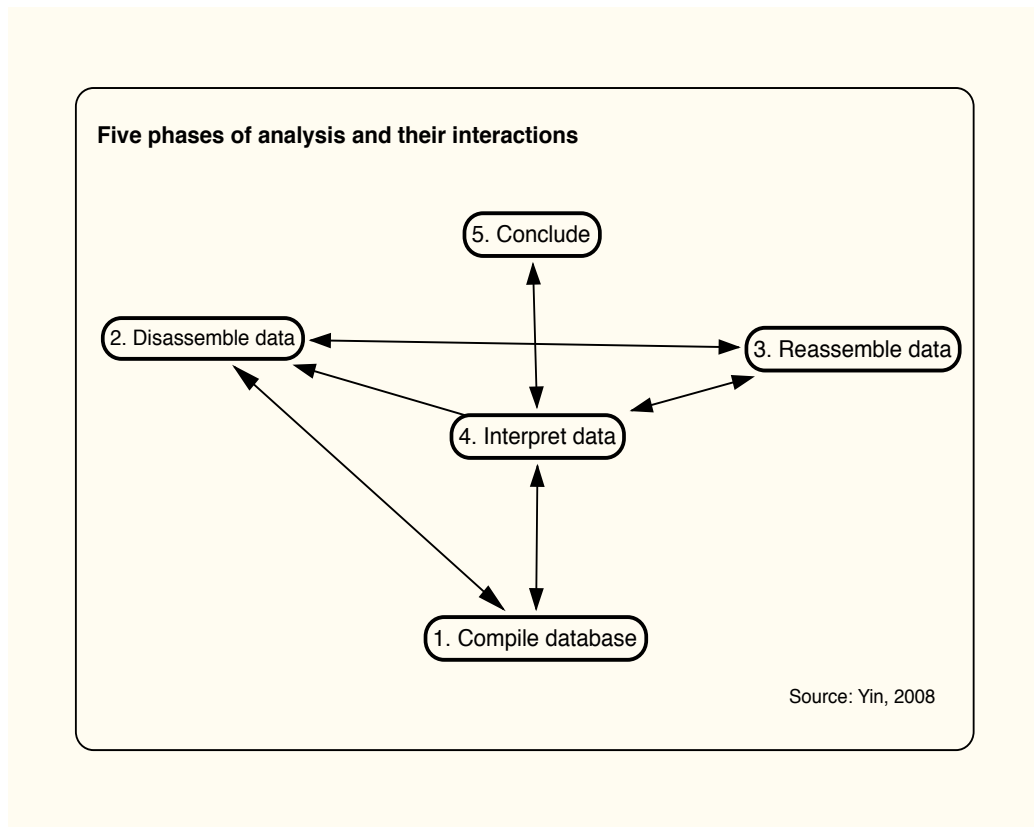
Source: authors' elaboration



#### 4.6.5 How to deal with Data Collected

Based on Yin's (2008) five phases of analysis, the present study uses the five steps in order to deal with the data collected during the fieldwork. These steps were tailored in order to address issues arising from several interviews collected during the fieldwork, these were also used to analyse direct observation and field notes. Figure 38 shows Yin's five phases of analysis and their interactions made by the arrows, the two-way arrows indicate that the researcher had the option to go from one phase to another phase while doing analysis, pointing out the flexibility of the process (Yin, 2008).

**Figure 38. Five Phases of Analysis and their Interactions**



Consequently, based on Yin's (2008) five passes of analysis, the present investigation analysed data collected as it follows:

## **1. Data compiled in databases**

In this starting phase, the data collected from the interviews was methodologically organised and compiled into the database. The computer assisted/aided qualitative data analysis software (CAQDAS) used in the present investigation was NVivo10, complemented by Scrivener a word-processing program, Scrapple a mind-mapping program and Numbers a spreadsheet program. Thirty-eight surveys and forty-two interviews were collected and volunteers assisted to transcribe some of them. Yet, it was up to the researcher and one volunteer to directly translate the transcriptions into English and compile them to the database, moreover, file notes and observations made by the researcher were also compiled into the database directly in English.

(1) Data was orderly compiled at first by date of the interview, note, or observation. It was suitable to have a track of the recordings conducted to a more accurate end-result; according to Yin (2008) a sense of order leads to stronger analyses and more meticulous qualitative research. (2) Interviews, field notes and observations were reread; to remember the context of what was happening at the moment. (3) After the first interviews the researcher initiated the analysis of the content, as suggested by Yin (2008), she started to recognised particular characteristics of the study and identifying key words, themes and tendencies; thus, the researcher linked the data gathered to the main study questions; and identified the insights that emerged. (4) Data was categorised into different records depending on their source, and then compiled into Scrivener, Nvivo10, and Numbers, by creating individual documents and files for every record with the assistance of identifiers (e.g. tag name, date, place, type of source). (5) The transcripts were reread and made noted of the first impressions.

## **2. Data was disassembled into databases**

In this second phase, the researcher disassembled the data into databases, coding and registering the process. (1) All relevant pieces and chunks of data (e.g. sentences, words, phrases, sections) were labelled, for instance, some of the labels or patterns were concepts (e.g. sustainable development, poverty, ecotourism),

activities (e.g. service providers, local businesses), opinions (e.g. impacts, benefits, sustainability, local community). (2) Interview quotes were also separated and integrated into their relevant categories. (3) After labelling, the codes were moved into different categories (i.e. codes were Identified and linked or combined into various into new codes and labels), with the objective to prioritised pivotal codes and dropping the rest. (3) The use of Scrivener, Nvivo10, and Scrapple was essential in order to disassemble the data. Starting from the point where the labelling was used to create codes, the software assisted in checking and rechecking the categories to further analyse them or create new ones. Numbers was mainly used to create simple graphics with the information obtained from the survey questionnaires.

### **3. Data was reassembled into databases**

This phase, was acknowledged by Yin (2008) as 'playing with the data', because it leads researchers to benefit in terms of insightfulness and the recognition of patterns. (1) The researcher looked for patterns identified in phase two, to analyse the codes in a creative, open-minded and unbiased way. (2) Through this process, codes were upgraded to generate new patterns and levels of analysis. This exercise helped the researcher to sort ideas while looking for patterns and additional information within databases. (4) The researchers employed different types of arrays to reassembling data such as hierarchy and gender, this contributed to patterns' observation in participants and the development of questions to compare previous analysis with the latest in a bigger picture. (5) Once the trends and the outline for the entire analysis were identified, the investigation moved own to the next phase.

### **4. Data was interpreted**

In this fourth phase the researcher conceptualised the data, by employing a wide range of interpretative skills. This study interpreted data collect by using five attributes of comprehensive interpretation (Yin, 2008): completeness, fairness, empirical accuracy, value-added and credibility (see table 11). Furthermore, in this phase the researcher made sense of the data and its implications, lessons learned, and trends be established in earlier phases.

Table 11. Five Attributes of Comprehensive Interpretation

<b>1. Completeness</b>	An interpretation structure was created, which included e.g. beginning, body of the structure and end.
<b>2. Fairness</b>	The judgement of the data collected was interpreted unbiased.
<b>3. Empirical accuracy</b>	Study findings were presented impartially.
<b>4. Value-added</b>	Outcomes of the investigations provide new knowledge toward literature in ecotourism, sustainable development and poverty reduction, as well as new insights in the context of TVC functionality and gaps from the cases studied, and how to overcome them.
<b>5. Credibility</b>	Research methods were well establish in both qualitative and quantitative data collection, and the triangulation of those methods gives more credibility to the study.

Source: adapted from Yin, 2008

In addition, the interpretation of findings obtained from survey questionnaires, theories and the literature reviewed also played an important part within the interpretation of the data as a whole.

## 5. Concluding

The conclusions of the study proposed the improvement in the way of thinking through the investigation. This investigation did not follow Yin's (2008) concluding methods, instead it was based on the TVCA which employed mixed methods and tools to deliver significant findings, for instance outcomes included recognised literature concepts and hypotheses in a sequence of events or the TVC, which is the key to the main process<sup>13</sup>.

<sup>13</sup> To see more details, please refer to 4.3.1 Guidelines for the Tourism Value Chain diagram and guideline number VIII.

#### 4.7 Limitations and Issues that arose in the Field

The limitations of the study are mainly related to resources, for example, time scales and situations of the communities where the research was carried. The places visited in Mexico to collect the data are marginalised communities and not easy to access, that is one of the reasons why the research is focused on small indigenous communities, in order to be able to gather data with small samples. In the context of resources, as many other indigenous communities in Mexico and Latin America, the lack of statistics was an issue when interviewing peoples or collecting surveys. Thus, there is some existing (dated) statistics that helped the process in some of the government websites, yet when in some cases (e.g. population, territory), the researcher had to rely on local authorities and leaders of indigenous communities to obtain informal, but probably more accurate information.

The first stage of the research data collection was from the 27 of August to the 18 of September 2013. Once at the destination it was rather a challenge to stick to the data collection procedure and schedule. It resulted inevitable to have some modifications made according to the current circumstances on the field in order to cope with the division of the indigenous peoples' territories, especially *ejido* and *communal places*. As mentioned before, gaps on the indigenous territories area was also part of the limitations. Hence, this confirms that a quantitative or qualitative method alone could not collect all data needed or to respond all the research questions as pointed out by Yin (2012) the investigator we be better prepare if using multiple rather sources of evidence rather than one (Yin, 2012). Furthermore, the data collection ended rather abruptly given that two hurricanes hit that region of Mexico and, due to the bad conditions of the roads, the researcher was unable complete the last set of interviews planned for the last week at the field, still between her and the three volunteers, they managed to obtain more data than it was expected.

Another limitation was the wide range of data the case study research produces and it takes long time to analyse it, meaning that just a part of the data collected was reviewed and transcribed during the field work, which did not allowed to see some gaps at the time. However, after the data was collected the researcher recognised (from the transcriptions and notes obtained from the field) the existing gaps among the links of the ecotourism projects' TVC. Yet, the researcher foresaw

that something of a kind was likely to happen due to time constraints or any other affairs. Consequently, the researcher decided to do a second visit to the Mexican community, hence the 13 of August 2014; the researcher and one volunteer arrived to the same indigenous community to conduct a second set of interviews with certain participants.

The second and final fieldwork was designed to be short in order to look for specific answers and maximise efficiency. However, five days later, there were riots given that some local businesses in the city of Ixmiquilpan had been robbed; the roads around the indigenous communities were closed, local people were marching on the streets and took some of the presumed robbers as hostages, one person died and at least three more were badly injured during this riots. As a result, the police was patrolling the streets of city. Thus, for the safety of the researcher and volunteer, they had to leave the field earlier than expected.

### **Fieldwork challenges**

The information collected during the fieldwork was not satisfactorily disaggregated to include exact numbers regarding the remuneration that suppliers and staff receive, day-visits, receipts flows (per person, per room), expenditure by tourists during their visit/stay at EcoAlberto's Ecologic or/and Water Park). The pivotal information gathered in this investigation (i.e. relevant data of EcoAlberto's tourism value chain) was gathered employing primary data collection tools (e.g. interviews, questionnaires, field notes), as a result of non-existent or very dated statistics (i.e. secondary data).

## **4.8 Reliability and Validity**

Reliability and validity represent an important issue for any case study, alongside the challenges of the presentation of research findings (Decrop, 1999; Veal, 2006). The researcher took care to identify the meaning and issues associated with reliability and validity that were taken into account to enhance the reliability of the research. According to Veal (2006, p.41) reliability is "the extent to which research findings would be the same if the research were to be repeated at a later date or with different samples of subjects." The validity of a study can be defined as the scope in which the research method follows and meets its principles while the course of analysing the findings of the investigation (Decrop, 1999). Nevertheless, the research had precautions when developing theoretical or general statements, based in an empirical approach. This was done by ensuring the levels of generalisation, this means, that all the results were categorised its importance within the topic of ecotourism in the context of dates and places where the data was collected (Veal, 2006). There were also other significant precautions that ensured the validity to this research.

As the present study uses a mixed method approach, the researcher had to indicated the awareness of these issues from both quantitative and qualitative research perspectives, as they tend to be manifest differently. For instance, "quantitative approaches are criticised because of their lack of rigour and credibility" (Decrop, 1999, p.2) whether quantitative approaches comprise collection tools that can be used for the different types of participants, but are unable to provide descriptions or to review answers and examples. Taking this into account, a quantitative approach applied as a single method would not have the success expected for the purposes of this research (Creswell, 2006; Cameron, 2011; Pavelek, 2013). On the other hand, by employing mixed methods research, it was possible to compensate the weakness of one method with the strengths of another (Creswell, 2007). Therefore, the mixed methods approach has been selected to increase the validity of the theoretical hypotheses and arguments in this investigation. Given the circumstances studied, reliability of the research is higher by employing both methods. Table 11 (bellow) shows the validation criteria and strategies taken into account by the researcher throughout the development of the thesis.

Even though validation criteria and strategies were difficult to deal with, due to the shortage of time, yet, triangulation gathers evidence from different sources and provides important situations throughout the data collection of the case study. In this context, the researcher has been very attentive by examining and analysing the reliability of the findings coming through diverse sources; thus, allowing the results to be more accurate and trustworthy.

Table 12. Validation Criteria and Strategies

Criteria	Strategy	Application in the study
Credibility	Triangulation	Multiple methods were used in the present study, to provide cross-data validity findings within the investigation (see Triangulation 4.4.2)
Transferability	Thick description	Qualitative data (e.g. interviews) was gathered and the information of the findings in order to allow the reader to evaluate its credibility.
Dependability	Auditing	Protecting all data records in all stages such as participant selection, field notes, dates of the interviews and transcribed data. Only the research team had access all the data collected (see Ethical considerations 4.6.2)
Confirmability	Audit approach and observation	Relied on field notes, recorded interviews and transcribed data; besides, the a field journal emphasised observation confirmability of what happened during data collection fieldwork (see Direct observation 4.5.6 and Field notes 4.5.7)

Source: adapted from Drecop, 1999 and Creswell, 2007

Consequently, mixed method and triangulation increased the reliability and validity of the research, even though risks to reliability and validity are unable to be fully eliminated, the researcher put in extra effort to reduce risks during throughout the investigation.



Furthermore, to gather reliable data and viable results in the investigation employed purposive sampling, which is a non-probability approach, thus, given that to the purpose objectives of this research the question of *how many?* is not really important, although the investigation shows estimated percentages and graphics to have a general idea of the situation, numbers *per se* are trivial. Instead the pivotal importance of the research lies on the understanding of the phenomenon, and how the information obtained to key participants (purposive sampling) can evaluate the hypothesis with accuracy, rather than looking for statistical validity. The different groups of key participants were selected from indigenous members from the Hñahñu host community, managers of the ecotourism venture and staff or personnel and other locals involved in the tourism activities; employees from government and NGOs, and tourists. The researcher and three volunteers collected data gathered during fieldwork. The interviews and surveys were done individually and in groups (e.g. eight participants). During the data collecting process all participants were willing to cooperate and they were also very keen to share their points of view, due to this, the researcher and volunteers analysed the scope of the study carefully, in order to avoid being dragged into affairs that were not related. For that same reason, the interview protocol was designed to answer the research questions. Most of the interviews were translated to English and interviews that were recorded were transcribed into Spanish almost every day in order to identify any missing points or issues. In addition, to ensure validity of the data, the researcher travelled back to the Hñahñu community a year after in order to interview some participants for a second time. Moreover, the use of data collection and other tools such as survey questionnaires, observations and field notes, reinforced the interviews and the rest of the data.

## 4.9 Conclusion

This chapter has sought to share the procedure that this study developed, and guidelines followed from other literature in order to provide a better understanding of the fieldwork surroundings and the conditions in which the data was collected. In particular, this chapter presented the research methodology used in this study in order to investigate the role of ecotourism to achieve sustainable development and poverty reduction objectives. It also justified the philosophical stance, which hides the data collection methods and the procedure for its analysis. Concerns related to ethics, reliability and validity have been addressed. This study, as appropriate for research located in a Hñahñu community, followed the interpretative paradigm approach allowing the researcher to interpret the perceptions of the local people. Therefore, the investigator has used triangulation in order to ensure the accuracy of the findings.

In essence, the research methodology approach has been described and analysed, with a justification of why the researcher selected mixed methods. This doctoral work adopted both quantitative and qualitative research designs. These approaches conducted the research into a specific path, one that leads the research process in order to provide answers to the research questions. The case study approach was complemented by the triangulation technique in order to maximise the validity and credibility of findings.

During fieldwork the researcher gathered data by using the case study approach and the TVCA. In other words, the data collection plan was designed by adapting multiple value chain analysis and TVCA of several studies and guidelines to the context of the present research. Moreover, given the nature of mixed methods, the data collection tools used in the field were semi-structured interviews, survey questionnaires, field notes and direct observation.

## **CHAPTER FIVE - Findings and Analysis of the Case Study: Hñahñu People Participation in the Tourism Activity**

### **5.1 Introduction**

This chapter provides the presentation, interpretation and discussion of the TVCA, summarises the evidence of the research findings of the data collected during fieldwork, and provides the outcomes of the research findings by analysing the challenges and opportunities to maximise the TVC efficiency among the case studies.

#### **Objectives of the Tourism Value Chain Analysis**

The objective of the TVCA in the present study is to respond three questions where is implicit that the employment of ecotourism is a mean for environmental sustainability.

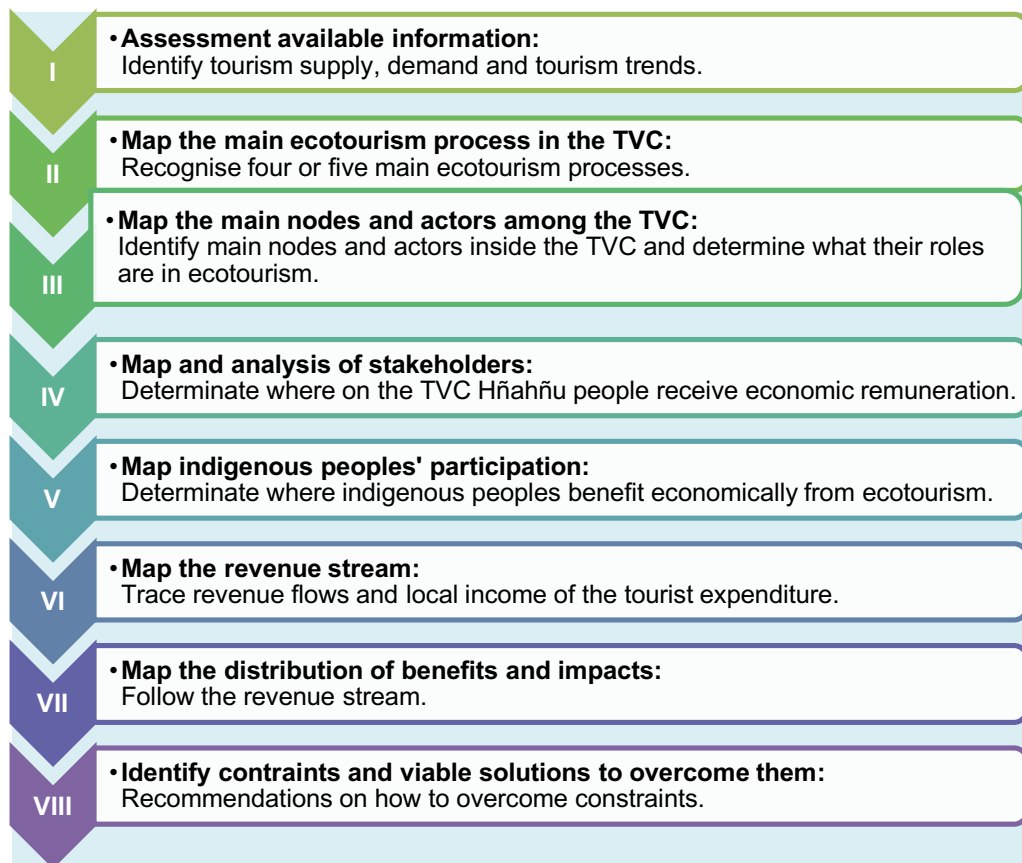
- 1) What are the financial and non-financial impacts that the ecotourism brings to the local community?
- 2) Does the Hñahñu ecotourism company distribute and adequately share revenues to the local community?
- 3) Is the Hñahñu ecotourism company financially viable?

#### **Overview of the Guidelines for Tourism Value Chain Analysis**

At this point, it is time to recapitulate the steps followed to analyse the TVC in this case study. Further, it is important to acknowledge that the guidelines employed for the mapping of the tourism supply chains was based on the different methods and guidelines that follow: 'A Handbook for Value Chain Research' (Kaplinsky and Morris, 2001); 'Evaluating Ecotourism as a Community and Economic Development Strategy' (Eplerwood, 2004); 'ValueLinks Manual: The Methodology of Value Chain Promotion' (Springer-Heinze, 2007); 'The Tourism-Led Poverty Reduction

Programme: Opportunity Study Guidelines' (Ashley et al., 2009a); 'Tourism and Local Development: An Introductory Guide' (Ashley et al., 2009b); and 'Making Value Chains Work Better for the Poor: A Toolbook for Practitioners of Value Chain Analysis' (Van Den Berg et al., 2012). Previously acknowledge in chapter 4, these guidelines and handbooks have been adapted and modified by the researcher according to the aims of the thesis and the circumstances of the case study. Figure 40. illustrates an outline of the eight steps used to analyse the TVC.

**Figure 40. Guidelines for the Tourism Value Chain Analysis**



Source: adapted from Kaplinsky and Morris, 2001; Springer-Heinze, 2007; Ashley et al., 2009

## **5.2 The Case Study: Tourism Value Chains Analysis of EcoAlberto Ecologic Park and its Hñahñu People**

### **Step I. Assessment of Available Information**

The first aspect recognised in this case study involved the type of business entity of EcoAlberto's parks to understand different issues that arose when reviewing the fieldwork information, especially regarding the rights and obligations of the Hñahñu people such as membership and labour participation. The second aspect is the circumstances of the region, presented as an assessment of available information gathered from testimonies and experiences narrated by the Hñahñu people themselves.

#### **1.1 Type of Business Entity:**

##### ***Parque EcoAlberto Sociedad de Solidaridad Social***

EcoAlberto's Parks operate as a collective labour system and are registered and organised as a society of social solidarity in accordance with the Mexican Law and the Social Solidarity Societies Act (LSSS) this implicates:

- EcoAlberto as society of social solidarity is constituted with the collective heritage of the Hñahñu people to carry out tourism activities, these persons are entitled to work and to allocate part of the proceeds of their labour to a social solidarity fund, that can be destined to the welfare of the local community or reinvested in the parks.
- Partners can freely agree on the modalities of their activities, to fulfil the purpose of their society (Art.1)
- The objectives of EcoAlberto are the creation of work sources, the practice of measures that tend to the conservation and improvement of the ecology, the sustainable use of their natural resources, the production, industrialisation and commercialisation of their goods and services, the education of members and their families, et cetera (Art.2)

- Hñahñu members commit to work for social purposes, comply with the layout deriving from internal regulations (Art.9)
- Rights of the Hñahñu members: voice and vote at assemblies, can be nominated for administration and management positions, obtain social benefits given by the society, et cetera (Art.10)
- Obligations of the Hñahñu members: contribute with their personal work for the fulfilment of EcoAlberto's objectives, make contributions to the EcoAlberto's social solidarity fund that is determined at the assemblies, attend and vote at the assemblies, et cetera (Art.11)
- EcoAlberto as a social solidarity society cannot not use salaried personnel. Labour at EcoAlberto's parks must be fulfilled by the partners, except, when partners cannot do a certain task, in that case professional or specialised services are required, and these may be contracted or provided occasionally or on a temporary basis (Art.14)

## 1.2 The Scope of the Destination

### Poverty, Migration and Ecotourism

The indigenous population of El Alberto, the Hñahñu people, were forgotten and ignored for a long time by the rest of the society and the government, as is the case of many indigenous groups in Mexico. Their geographical isolation, scattered in small communities across remote regions, only made it easier to ignore them. The majority of the participants interviewed in 2013 and 2014, recalled always having struggled economically, and being unable to earn the necessary income to maintain their households. Lacking economic opportunities in a small community, and being far from big cities, the only jobs available around the area were cultivating and harvesting the lands. Primarily, this involved growing *maguey* and other type of cactuses, making food or goods with them, collecting fruits and chopping dead trees for firewood. These products were normally taken to sell in the nearby city of Ixmiquilpan, and sometimes they would go as far as Pachuca.

*"I was very poor when I was a child, and my parents did not speak Spanish. Together me and my siblings had to collect fruits, worms and grasshoppers, while my father collected and sold firewood, and my mother worked reaping maguey. We were like isolated in this community, we never went to visit other places, until father took us to Ixmiquilpan to help him sell firewood; he needed us to help him carry it. I did not go to school neither did any of my siblings."*

*-Alberto, 96, Hñahñü member (Fieldwork, 2014)*

Poverty, and lack of economic opportunities gave rise for Hñahñü people to start looking for jobs outside their community. Many of the members started to migrate to other cities and states, the length of their absence depended on the job requirements and the location. Thus, they became construction workers and maids in neighbouring cities (inter alia Ixmiquilpan, Pachuca, Mexico City). Some were able to return to El Alberto on the weekends to see their families. Others, such as the live-in maids in Guadalajara and Monterrey, were required to stay away for months. Sometimes, years would pass without anyone hearing anything from them. These were very young girls, often as young as 13 years old, and they were forced to leave their homes to make their own money, and also to save money for their families or an eventual return.

*"My brother and I went to work to Mexico City when I was 16 and he was 14 years old, we worked in construction during three years, we did hard work and we earned so little, we could hardly afford to send back any money for our family to eat, our father had just passed away, so we were the only income that our mother and our sisters counted on, but it wasn't enough, so my older sister also came to the capital to work as a live-in maid."*

*- Ivan, 24, Boat guide (Fieldwork, 2014)*

It was not too long after the start of national migration that El Alberto's indigenous members began to enquire and gather information about working wages and living expenses in the US. Older people from El Alberto recalled that national migration started in the early 1960's, and migration to the US started taking place in the late 1980's. They also recall that it was easier to get to the US back then, nothing similar to the situation today.

*“The first time we crossed, the young man who guided us did not ask for any money, it looked like he was having fun, like playing a game, we simply walked in when the police were distracted... we could get in and out of the U.S. as many times as we wished; that year, I came back to El Alberto four times. Now, things have changed... it is very difficult to cross once, and it’s hell to go back and forth, it is not like playing a game anymore, you can actually die trying to cross the border.”*

*-Juan, 60, Hñahñu member (Fieldwork, 2014)*

Given the data obtained from semi-structured interviews with the local community members, it can be estimated that Hñahñu members who are currently working in the U.S. are located mostly in Las Vegas, but also in Texas and in Arizona. Furthermore, while men are mostly employed as construction workers, women are employed within cleaning services (e.g. housemaids, janitors in hotels, restaurants, and convenience stores). In addition, other results of fieldwork in 2013, suggests that the first group of Hñahñu people from El Alberto who started to migrate illegally were married men with children (two to three children in average), and in an age range of 27 to 50 year-old (Fieldwork 2013, 2014). These men needed to provide for their families, who were living in very poor conditions. According to some of the migrants, they were forced to leave due to the lack of economic opportunities in El Alberto, while their wives and children remained on the lands, living from their remittances.

*“My mother, my siblings and I, were very upset when my father had to go to the US but, our family was very poor, and there was no work here (at El Alberto); our house was almost falling it was made out of wood sticks and the roof was made of maguey leaves, when it rained we even got wet, and what I remember the most is that we were always cold. We saw that other members of the community that had someone in Las Vegas, were doing very well, they had houses built in less than a year. It wasn’t an easy decision of course, I recalled my mother crying over it, but my father had to go, we needed the money.”*

*-Heriberto, 37, Hñahñu migrant (Fieldwork, 2014)*

The international migration was initiated because there were not enough opportunities locally; and as an effort to improve the quality of life for the migrant’s



family. Furthermore, the remittances provided by international migration were reflected in El Alberto almost instantly. People no longer starved or spent cold wet nights, children began to dress better, to wear shoes and to attend school; the community in general looked healthier. In addition, houses were rebuilt with more resistant materials such as cement and bricks, and some people even bought televisions and cars.

*"It was very difficult to see my children starving and being cold, so, as the head of the family, I knew I had to do something. I live between Las Vegas and El Alberto since 1992. I work in construction over there, sometimes I go away for a few years, but, I send money to my wife, now we have a house made out of cement and my children go to school; then it takes me a couple of years to save the money I need to come back to El Alberto, but then, I can come back and be here for a few months or a year, before I have to go back to work, it's a great risk to cross the border and it's been hard to be away from my family but, it has paid off... when I see my children, they look healthy and they are getting educated, they will have better opportunities than I had, and they won't have to suffer what I suffered, and that's all I ever wanted."*

*-Guillermo, 51 Hñahñu migrant (Fieldwork, 2014)*

In accordance with the example stated in the quote above, findings from the fieldwork demonstrate that the remittances coming from the US made the community to experience an economic boost, materially and directly increasing their quality of life. These clear incentives led more community members to leave their lands and (illegal) international migration rapidly became a trend among El Alberto's members. While migration has been more popular among adults in their early 20's to late 30's in the state of Hidalgo, in the past two decades, young people started to migrate earlier and earlier, some as young as the age of 15 (Fieldwork, 2013; 2014). Although, there are no accurate statistics on the number of El Alberto's illegal migrants confirmed by the Mexican government,<sup>14</sup> it has been estimated by the community authorities that at least 90% of El Alberto's population has migrated illegally to the US at least once, and many of them live their lives between the US and El Alberto, traveling back and forth. In addition, it is estimated that more than half of those who reside illegally in the US<sup>15</sup> are young men. However, Hñahñu

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<sup>14</sup> The only data available regarding members of El Alberto and US migration is too broad, it only provides statistics by state.

<sup>15</sup> Until 2014.

people living in the US seek to remain in contact with each other through different get-togethers; for instance they have regular reunions to gather money destined to El Alberto<sup>16</sup>, meetings at church, to play sports, and on Mexican holidays (Fieldwork, 2013; 2014).

Notwithstanding the minimal but real economic benefits to the community, the illegal immigration has had serious repercussions on the society. During fieldwork at El Alberto (2013; 2014) people (mostly the elder) recalled that international migration helped them out of extreme poverty. However, they also explain that in less than a decade, they started noticing that it also contributed to significant adverse effects. After remittances assisted families in need, in some cases started to create problems, people receiving remittances became dependent of them, while some of the women stopped working, children grew up without their fathers, they had few incentives to achieve well in school or contribute to their own people's wellbeing. Their only future was to migrate to the US to earn money, as a result they became unproductive, dispirited and troubled. This unproductiveness affected the functionality of the community. In many cases, the long periods of absence caused marital problems and sometimes the disintegration of families. Another issue was the behavioural change of the community members themselves, especially the people that returned from the US. According to the interviews, the Hñahñu people who stayed noticed this change in their fellow community members.

*"Migration has been always a problem, but back in the late 90's it was worst, because when they (migrants) came back, especially teenagers or young adults, they just behaved weird... not all of them were troublesome, but it was obvious that they were losing our Hñahñu heritage, and they started influencing other people."*

*- Adolfo, 40, Hñahñu chief (Fieldwork, 2013)*

In Adolfo's opinion, which is supported by statements from other interviewed people from El Alberto, they noticed that migrants were not behaving according to the Hñahñu culture anymore. Further, community life at El Alberto was massively reduced due to migration, the community was depopulated, and started to resemble a ghost town. The inhabitants that remained were mostly women, young children and the elderly people, given that men left behind their families when they migrated.

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<sup>16</sup> If the assembly requires their help, e.g. for development projects.

In consequence, the community decided to create a new set of rules before their Hñahñu heritage was lost forever, and other issues went further. With the incorporation of those rules, many members were forced to return to claim their lands, to keep their status as Hñahñu members, and to contribute to El Alberto's sustainable development; others returned under their own volition in order to recover their culture, and heritage.

*"I don't like the way people think they have to go to the other side (the US) to make money, it's better to stay here with the family and make less money, than to make a lot, but then your wife and children no longer know you, they need someone to look up to, and if that person is in the wrong place, well... everything goes wrong. I mean the community looked empty, only women, children and older people were living here, and then they started to migrate too."*

*- Pedro, 52, Hñahñu member (Fieldwork, 2014)*

As reported by community members, El Alberto used to look like an abandoned community, the absence of men between 20 and 40 years old was highly noticeable at least for the decade between 1990 and 2000. This absence was reflected in household difficulties, and the break-up of relationships between husbands and wives. People tended to notice these issues when it was already too late. Many decided to return to El Alberto for good and others live between both places, saving enough money, so they could return later and stay with their families for a few months. However, due to controls and security policy changes, the risks of migration and border crossing became pricier and dangerous (Fieldwork 2013, 2014).

## Ecotourism

Hence, given the circumstances of the community, the members of El Alberto themselves originated the idea to create a tourism attraction that could generate revenues locally, enough to replace the incomes that were needed from international migration.

*“We, the Hñahñus, who stayed, noticed that people who came back (from the US) had changed; they dressed, talked and acted different, and not only that, we realised that we were losing our roots as people from the land, our culture and traditions, and teenagers often turned violent, we decided that we had to do something in order to stop all that. Of course we were happy about remittances helping families from the community, but losing ourselves to that, was a high price that we will not continue to pay. We had to come up with a better idea to make money.”*

*- Felix, 42, Hñahñu chief (Fieldwork, 2013)*

Hence, the community assembly of El Alberto created a plan for the development of an ecotourism project that could replace internal and cross-border migration. The project was presented to local and regional authorities who played an important part in the initiation of the ecotourism project. The National Commission for the Development of Indigenous Villages (CDI), a Mexican governmental institution, granted a fund to build toilets and changing rooms for a small swimming pool (which the Hñahñu people already owned), one which was fed by natural hot-springs. Once this proved successful, in 2004 CDI granted more funds for the construction of a bigger swimming pool for their water park. However, the water park did not have an excellent start, given all the other hot-spring water parks that were already available in the Mezquital Valley. Many of those water parks were already well established, solid projects that were much bigger than EcoAlberto. Furthermore, the struggling tourism project was not enough motivation for the members to abandon the town or migration, it was clear that people needed a better incentive to stay. El Alberto's members knew that they had to offer something more innovative to complement the water park project, and they decided to take advantage of other natural resources. As a result, they created EcoAlberto Ecological Park at *el Gran Cañon* (the Grand Canyon), a vast landscape with hills and a river. The place started to gain popularity after they integrated an unusual attraction; *la caminata*

*nocturna* “The Night Walk” a hiking re-enactment of the experiences of El Alberto’s people when crossing the border (illegally) between Mexico and the US.

*“La caminata nocturna (The Night Walk) was created to show our own people what they will suffer in their journey through the desert... members from our community that have crossed the border, re-enact their journey during this hike to the rest of us, as a way to share their experiences.”*

*- Juan, 51, Hñahñu member (Fieldwork, 2013)*

According to the Hñahñu community, the aim of EcoAlberto Ecologic Park was (and still is) to keep fellow community members from abandoning the community, particularly young adults, and to revive forgotten indigenous traditions and cultural heritage whose loss was accelerated by migration. The initial idea was to offer boat rides and the night walk, after the construction of a pathway leading to the lowest point of the Grand Canyon. In 2006, CDI granted funds under the Ecotourism Program for Indigenous Zones (PEZI) and the Program for Alternative Tourism in Indigenous Zones (PTAZI) (as seen in table 12), to build new infrastructure such as traditional cabins for accommodation, a restaurant, toilets and dressing rooms, and a plant to treat the water in order to make it potable for the international palate. Moreover, after the construction of certain new roads, the community began to implement other adventure and ecotourism attractions such as zip-wires and camping areas.

*“We struggle with many things here, for sure but, at least, there is people here, men don’t go to the other side (the US) as much as they used to, and the young no longer grow up with the idea of leaving the town. Now there is work to do here, we may not make much money, but at least we have less things to pay at the community, EcoAlberto pays for things we need like stuff at the clinic. The other day the power generator broke, so revenues from El Alberto covered it. Before, we would have to chip in to get a new one and those things are expensive.”*

*- Artemisa, 43, Artisan (Fieldwork, 2014)*

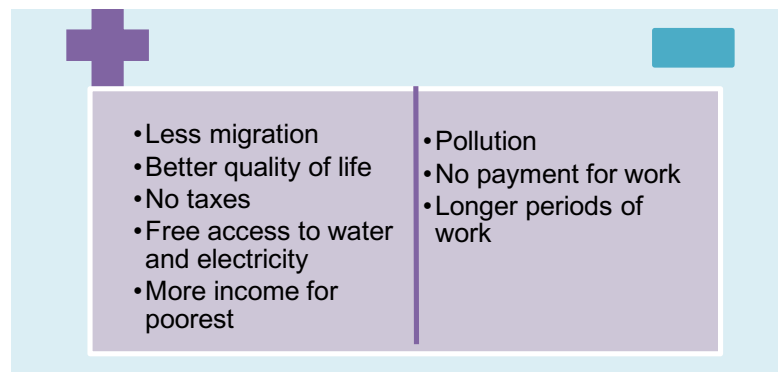
Table 13. CDI Financial Grants 2002-2008

Year	Amount granted	Inversion	Programme
2008	MX\$ 1,500,000 US\$ 115,390	Construction and equipment of 3 cabins	PTAZI
2007	MX\$ 1,500,000 US\$ 115,390	MX\$1,500,000 US\$ 115,390	PTAZI
2006	MX\$ 1,500,000 US\$ 115,390	Construction and equipment of 5 cabins and 1 restaurant. Construction of a water treatment plant, toilets dressing rooms and two suspension bridges.	PEZI
2004	MX\$ 1,210,000 US\$ 92,307	Construction of a swimmingpool	Agroecology and ecoturismo
2002	MX\$ 268,662 US\$ 20,670	Construction of a toilets and dressing rooms	Agroecology and ecoturismo

Source: author's elaboration based on CDI Report, 2014

During the interviews and informal conversations, participants were asked to share their views on how the development of ecotourism impacted life at El Alberto; 8% cited negative impacts, such as extra work and pollution, 92% mentioned positive changes like less migration, more money flowing into the local economy and better quality of life, especially for the children (figure 41).

Figure 41. Impacts of Ecotourism at El Alberto according to its Inhabitants



Source: author's elaboration based on data obtained during Fieldwork (2013, 2014)

Women working at the *Ya Mutsi Beñha* cooperative, explained that even though they did not obtain direct benefits from EcoAlberto, the park attracts tourists who wander around the local community and buy their products.

*“My family used to be very poor, now, thanks to tourists that come to EcoAlberto, I earn money knitting purses and selling food, it is not much but, we had less expenses also, we don’t pay for the water and electricity or other things that we did in the past, now the little money we make we can keep for ourselves. My husband sells firewood at EcoAlberto’s camping grounds, he had to come back from the US to help out at the parks, though, he doesn’t earn much money there we make just enough to build a better house and I’m happy because he is back.”*

*-Silvia, 45, Artisan (Fieldwork, 2014)*

The majority of the community members assured that the development of EcoAlberto Ecologic Park has generated tangible and intangible benefits for the community. Even though it may not be possible to evaluate benefits in factual numbers, the gain of the Hñahñu people through ecotourism can be seen in the effects at the community such as the creation of new and better infrastructure e.g. a road that makes it easier to travel to other nearby cities, schools, a clinic, etc. Other positive outcomes include the reconciliation among migrants and non-migrants, the empowerment of women, the facilitation of community services. A particular benefit has been clear signs of revival of the Hñahñu heritage that has also strengthened their connection with the land (towards its sustainability) and began to generate a sense of pride among younger generations. Thus, children are learning to feel proud and love their indigenous heritage, so they no longer grow up with the sole idea to abandon their community. Furthermore, the development of ecotourism has not only assisted in the reduction of poverty and migration, it has also attracted investment for locals in different sectors, such as the creation of a cooperative for women for the creation of artisanal souvenirs and a plant that treats the water from the region.

### 1.3 Analysis of the Tourism Supply and Demand

The tourism supply and demand of products and services offered at Ecologic Park EcoAlberto are analysed in this section. Starting with the tourism supply side, it analyses EcoAlberto's infrastructure such as accommodation amenities, products, activities and services available for visitors to experience real ecotourism. In contrast to the supply side assessment, the analysis on the demand side was more challenging, since there was a lack of statistical data by national and regional governmental Mexican organisations (Datatur<sup>17</sup>, INEGI<sup>18</sup>), and insufficient company records. However, the researcher and her team worked with managers and personnel of EcoAlberto, and complemented by interviews and questionnaires to tourists and residents it was possible to estimate the following numbers.

#### Tourism Supply

##### Activities and Attractions

EcoAlberto embraces two ecotourism projects or parks - the ecological park also known as *El Gran Cañon* (the Grand Canyon) and the Water Park, separated by 3 km. *El Gran Cañon* offers beautiful scenery and rock formations to practice zip-wires and rappelling with a drop of more than 30 meters, hiking and walking tours to observe local flora and fauna through a hanging bridge, boat rides along the river Tula, a playground and family recreation area for camping. At night, the Grand Canyon offers a spectacular show with torches and its primary attraction *la caminata nocturna* (The Night Walk), a guided role-played tour representing real experiences of Hñuhñu illegal migrants that have crossed the border to U.S. to seek economic opportunities and an escape from poverty. Contrastingly, EcoAlberto Water Park has an area of 650 m<sup>2</sup> with three swimming pools, two wading pools and slides of various sizes. According to the managers, the Water Park has a carrying capacity of 1,500 people. The pools are fed by natural hot springs with temperatures between 36 to 38 °C. (EcoAlberto 2013; Fieldwork, 2013).

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<sup>17</sup> Datatur: Tourism data, internal body from the Ministry of Tourism.

<sup>18</sup> INEGI: National Institute of Statistics and Geography.



## **Tourism Demand**

Tourism at EcoAlberto started developing more than a decade ago, although, the chiefs of El Alberto and the Hñahñu community agreed in interviews and informal conversations that it took about two to three years for them to see results (Fieldwork, 2013). As observed in many other tourism case studies, obtaining officially sanctioned data and statistics in small and remote communities, is difficult. In the case of EcoAlberto, tourism data is not only insufficient, but referring to interviews and conversations carried with EcoAlberto's managers, administrators, and workers may mean that some figures are highly inaccurate. For instance, one clear case is found in the data on the tourism arrivals.

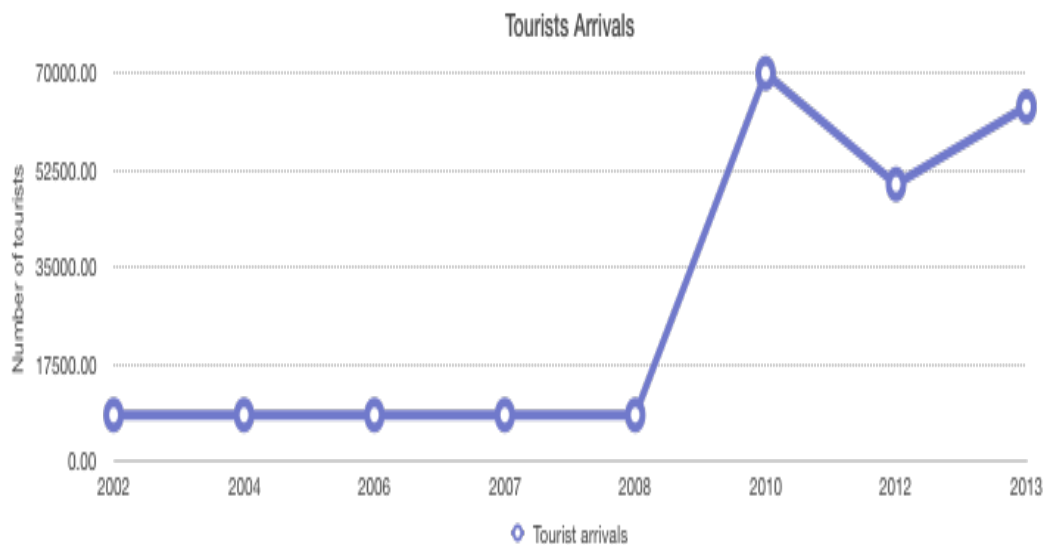
## **Tourism Arrivals**

There are no factual statistics of tourism arrivals to EcoAlberto or El Alberto, the closest statistics that the government holds are compiled totals which encompass the number of arrivals for the entire state of Hidalgo. Nevertheless, the research team gathered the following total numbers of arrivals (see figure 42). A file provided by the National Commission for the Development of Indigenous Peoples (CDI) in 2014, states that an average of 700 people visited EcoAlberto per month during the years, 2002, 2006, 2007 and 2008; therefore, the estimated of tourists that visited EcoAlberto is a total number of 8,400 tourists per year in contrast to 70,000 recorded in 2010 in a journal article by Gonzalez and Tovar<sup>19</sup> (2012). In addition, the figures obtained in this investigation were closer to those provided by Gonzalez and Tovar in 2010, than those given by the CDI in 2014. Hence, it can be estimated that in 2012, EcoAlberto received approximately 50,000 tourist and 64,000 in 2013 (Fieldwork, 2013; 2014). The numbers of arrivals in these findings are far larger than those recorded by CDI, yet, if the records by Gonzales and Tovar in 2010 were accurate, this means that EcoAlberto's numbers have decreased in the past years.

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<sup>19</sup> Gonzalez and Tovar (2012), in this research the authors gathered data from most of the tourism parks of the Mesquital Valley through primary data collection in the case of EcoAlberto, the authors interviewed the park's managers and employees at the time.

**Figure 42. Numbers of Tourists**

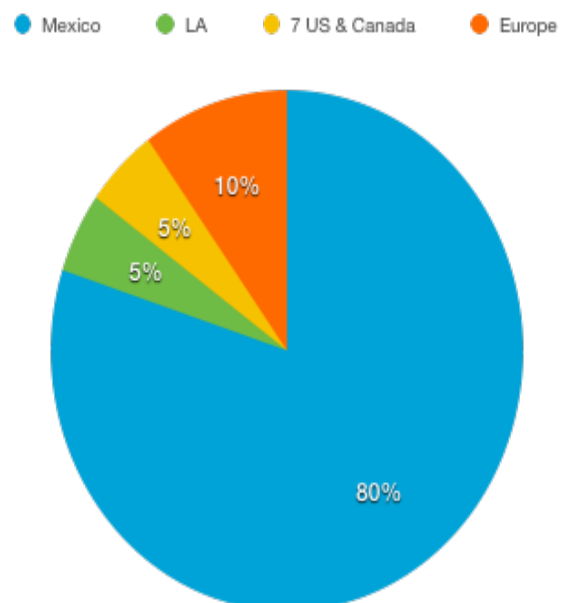


Source: author's elaboration based on Gonzalez and Tovar, 2012: CDI Report, 2014; and Fieldwork, 2013; 2014.

## Nationality

In terms of the visitor's nationality, a substantial number of visitors at EcoAlberto were domestic, 80% according to data gathered in 2013. These visitors are originally from the state of Mexico, Hidalgo, Queretaro, San Luis Potosi and Mexico City. In comparison, only a small percentage of visitors recorded come from foreign countries, 5% from Latin America, 10% from the US and Canada, and less than 5% from Europe. Nevertheless, data appears to suggest that the number of foreign visitors has increased slightly over the last five years.

**Figure 43. Nationality of Tourists**



Source: author's elaboration based on data obtained during fieldwork (2013; 2014)

## Seasonality

Managers and staff at EcoAlberto (Fieldwork, 2013; 2014) reported as high season the following: Spring, in March and April, especially during *semana santa* or Easter Holiday; June to August; end of the year in December; and during weekends and long weekends (e.g. the day of the dead, Mexico's independence day, etc.). In comparison, they reported autumn from September to November to be the lowest season of the year.

## Bookings and Travel Agencies

EcoAlberto holds agreements with the following travel agencies: *Aventuras Nacionales* and *Quito Sol* situated in Mexico City, and *Vivelo* in Pachuca. These agreements consist in giving discounts on the packages, according to EcoAlberto's administration and some of the company's employees (Fieldwork, 2014); the discount range is between 15 and 20 percent. However, these agencies have no access to EcoAlberto's grounds; instead, their business (at least in relation to EcoAlberto) relies on providing transportation (i.e. buses, vans, and drivers), not on providing tours or any other kind of guidance at the destination<sup>20</sup>. Furthermore, data retrieved from the interviews also showed that the majority of the tourists who visited the parks (in the last few years<sup>21</sup>) did so independently, rather than relying on travel agencies. In addition, packages are not for the exclusive use of travel agencies.

## Length of Stay

Although the administration of the company did not hold a record of tourists, they were able to roughly estimate the length of stay at EcoAlberto. According to the company estimates, the visitor's average stay is two days. EcoAlberto's personnel estimated that tourists staying one night were about 15%, while 22% stayed for two nights; and 5% stayed three or more nights, in 2013. The majority of tourists that stayed one and two nights were reported during weekends. On the other hand, bookings for three days onwards took place during high seasons (e.g. Easter Holiday and summer breaks). Furthermore, the outcomes of the fieldwork also

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<sup>20</sup> These activities are exclusive of the Hñahñü people themselves.

<sup>21</sup> There are no estimates of these records (before 2010).

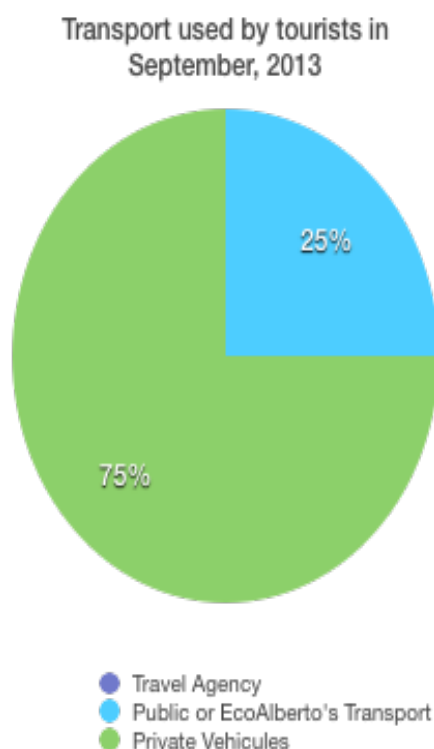
reported that tourists who booked accommodation at the cabins were mainly couples that stay one and two nights, while bigger groups preferred the camping area. However, one-day trips remained highly popular, particularly among visitors from neighbouring communities and cities. It was estimated that more than half (56%) of visitors in 2013 did not stay the night (Fieldwork, 2013, 2014).

## Transport

**Figure 44. Transport used by Visitors, 2013**

Source: author's elaboration (Fieldwork, 2013; 2014)

TYPE OF TRANSPORT	TOURISTS
Travel Agency	0
Public or EcoAlberto's Transport	5
Private Vehicules	15



EcoAlberto only offers transport from the city of Ixmiquilpan, charging a return trip at MX\$ 50 (US\$ 4) per person. Tourists that require the service from distant places (such as Mexico City) have to arrange transport through the tourism agencies that have arrangements with EcoAlberto. As mentioned above, these agencies profit from transportation services (at least regarding EcoAlberto), therefore, in order to have viable prices this (e.g. school students, company workers, and foreign tourists) in buses or vans to transport visitors. Moreover, price rates can vary depending on the location where the service is requested (e.g.

Mexico City airport, Pachuca, Queretaro), and the number of costumers. According to the questionnaires and interviews collected by the research team in September 2013; 0% travelled with an agency; 27% of tourists in small groups (e.g. couples and solo travellers), were reported to travel to the parks using public transport or EcoAlberto's van and 73% travelled to EcoAlberto in private vehicles.

### **Reason to Travel and Type of Tourist**

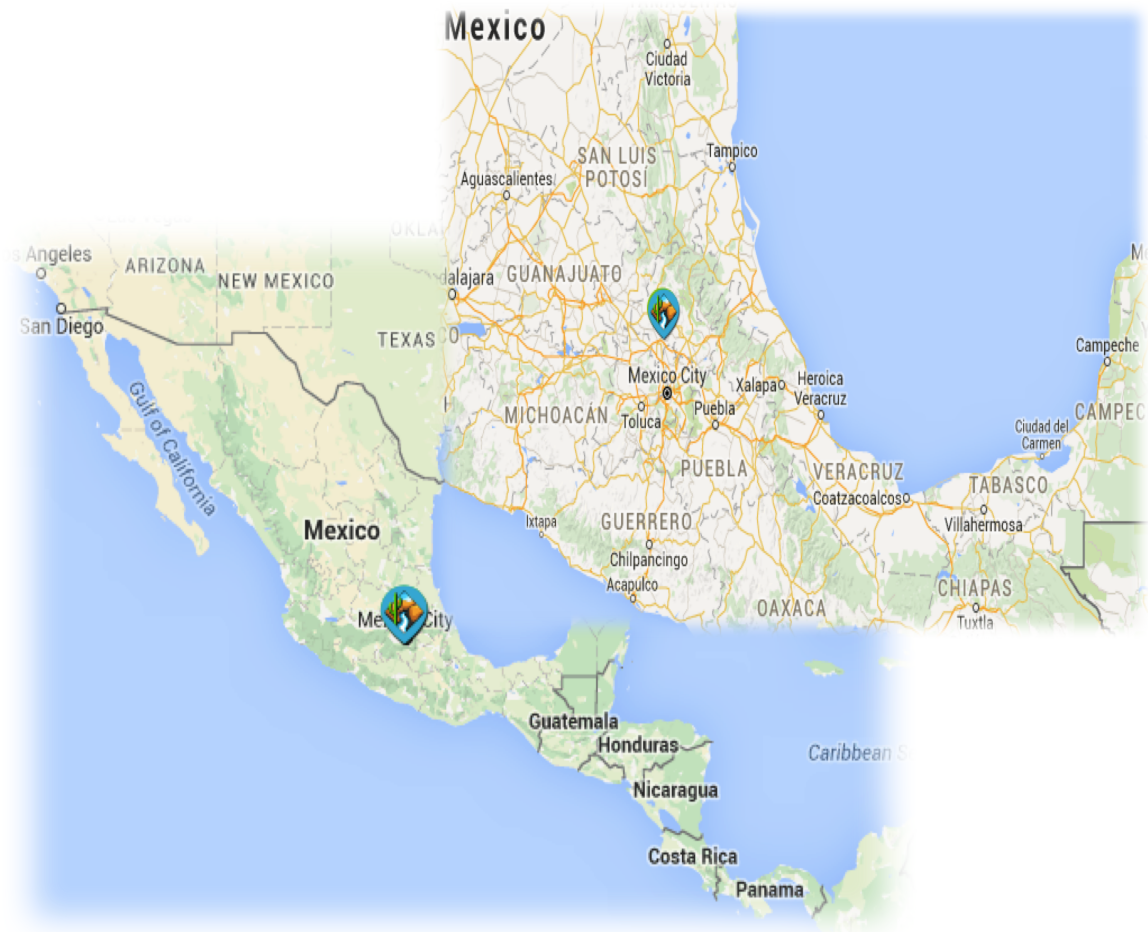
Findings of the tourist survey carried by the research team in September 2013, reported that most tourists are fundamentally found in the leisure category. 43% of the survey participants travelled to practice nature-based sports and adventure activities such as kayaking, hiking, rappelling, zip-wiring, etc. (with the Night Walk being the most popular activity); 38% stated that they had sought to visit the area in order to enjoy the natural hot springs at the waterpark; 14% explained that they had travelled to connect with and nature and engaging in simple activities with family and friends e.g. gatherings, playing football, camping and exploring Hñahñü culture; and 5% did not specify their answer (Fieldwork, 2013).

Furthermore, 57% of the tourists interviewed in September 2013 informed it was their first time at EcoAlberto, 16% said that they have visited EcoAlberto four or more times; 14% has visited twice, and 13% answered they have been there on multiple occasions. In addition, and fortunately for the EcoAlberto's ambitions as a venture, 94% announced that they would consider returning.

## Step II. Map of the Main Ecotourism Process at EcoAlberto

The previous section identified and analysed important information at El Alberto regarding demand, supply and other trends in the context of ecotourism. Thus, as stated in the methodology chapter the following step is to identify the main process of ecotourism at El Alberto. This step is employed as a starting point to recognise the tourism value chain main components, and from there identifying the rest.

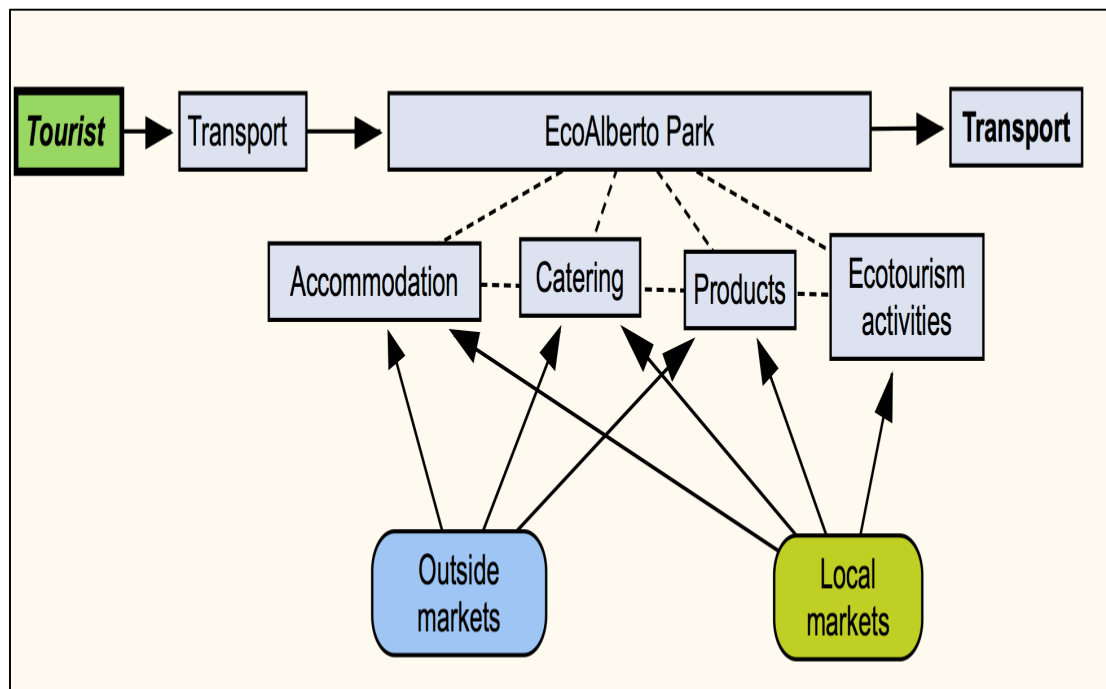
**Map. 3 El Alberto, Hidalgo, Mexico: Area of Study**



Source: Google Maps, 2016

The map above locates El Alberto, which has the attractions (1) EcoAlberto Water Park and (2) EcoAlberto Ecologic Park *El Gran Cañon*, these are included among the limits of El Alberto's communal land. Hence, it is also important to note that whereas the tourism value chain was mapped at EcoAlberto Ecologic Parks, linkages towards local and outside markets can also be appreciated in figure 45 (below, in boxes green and blue, respectively).

**Figure 45. Map of the Main Ecotourism Process at EcoAlberto**



Source: author's elaboration based on Springer-Heinze, 2007

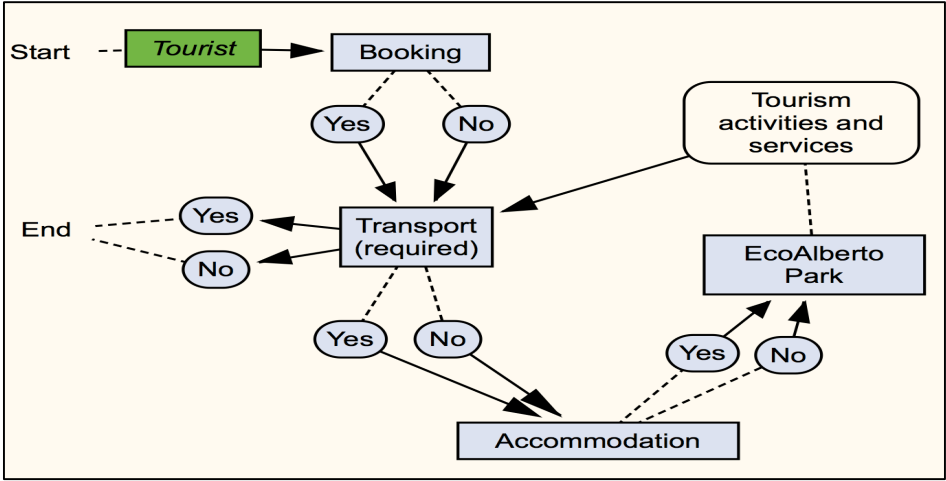
As it can be appreciated in the figure above, the nodes that take part in the main ecotourism process of EcoAlberto is divided into:

- Transport either arranged by the tourism agency or directly with the EcoAlberto's drivers.
- Ecotourism venture *per se*, providing direct services such as accommodation, catering and beverages, artisanal products, and ecotourism activities.
- Micro businesses and independent traders outside EcoAlberto which benefit

from the tourism activity e.g. convenience stores, food and meat traders, stall and street vendors, artisanal and other small craft vendors.

Thus, figure 45 highlights the main processes, however, the actors generating the most revenues within the ecotourism process are those under the umbrella of EcoAlberto, of which there are four: accommodation, catering, artisanal products, and ecotourism activities.

Figure 46. Ecotourism Itineraries at EcoAlberto



Source: author's elaboration based on fieldwork (2013, 2014)

Figure 46 shows the different scenarios that can take place when a tourists visit EcoAlberto, and even though the map above shows a straightforward process, it is more complicated than it seems. Fieldwork carried out in El Alberto in 2013, showed that ecotourism itineraries could result in many scenarios, the table below has outlined the seven most common.



**Figure 47. The 7 Most Common Ecotourism Itineraries at EcoAlberto**

1. Tourists book holiday packages through one of the tourism agencies, they are picked up from a nearby city and transported to one or both of EcoAlberto's parks; staying one or more nights, purchasing at the parks' stores, eating at the restaurant, engaging in ecotourism activities, and finally they are transported back to where they were picked up.
2. Same as option 1, but visitors do not book accommodation services (day trip).
3. Same as option 1, but visitors do not book any transport to EcoAlberto's parks (drive by themselves).
4. Visitors do not book through a tour operator, but they purchase directly for transport from a nearby city and to one or both parks; staying one or more nights, purchasing in the parks' stores, eating at the restaurant, doing the ecotourism activities, and finally they are transported back where they were picked up.
5. Same as option 4, but visitors do not make use of the accommodation services (day trip).
6. Visitors do not book through a tour operator, they drive by themselves to one or both EcoAlberto's parks paying directly the entrance fees and accommodation, purchasing in the parks' stores, eating at the restaurant, doing the ecotourism activities, and finally they leave on their own.
7. Same as option 6, but visitors do not make use of the accommodation services (day trip).

Source: author's elaboration based on data collected from fieldwork (2013, 2014)

Findings obtained from questionnaires to tourists at EcoAlberto in 2014 (see table 14) revealed that scenario 6 was the most popular with 48% requiring accommodation and ecotourism services, followed by option 3 with 23%, then scenario 7 with 21%, and finally scenario 4 with 8%; none of the participants responded to scenarios 1, 2, and 5 which require transport.

Table 14. Most Common Ecotourism Itineraries at EcoAlberto

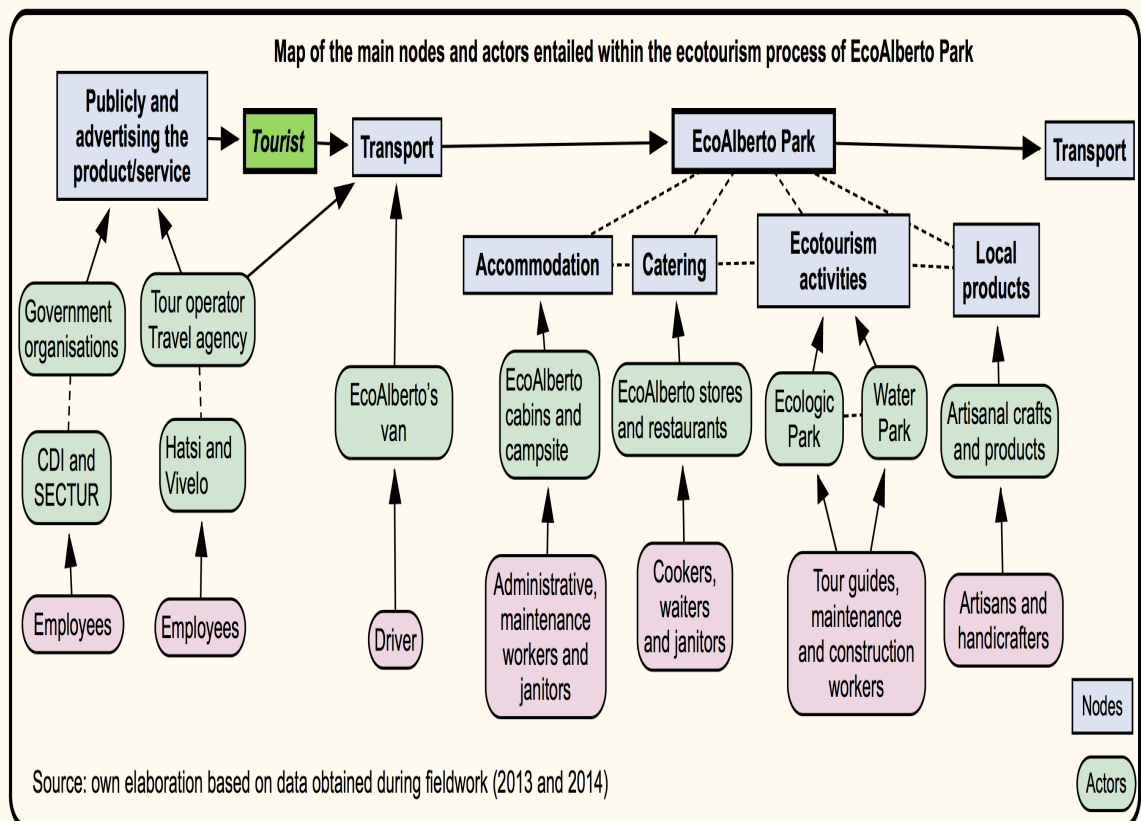
Option	Booking	Transport	Accommodation	Eco-activity
1	✓	✓	✓	✓
2	✓	✓	x	✓
3	✓	x	✓	✓
4	X	✓	✓	✓
5	X	✓	x	✓
6	X	x	✓	✓
7	X	x	x	✓

Source: author's elaboration based on data obtained during fieldwork (2013, 2014)

### Step III. Map of the Main Nodes and Actors of the Tourism Value Chain

In this section the TVC commences to expand both vertically and horizontally by categorising the main nodes of the ecotourism process and identifying principal actors that participate within it. In accordance with the literature on value chains and TVCs , each chain has a central process followed by their own tailored activities. In the case of EcoAlberto each of the seven nodes recognised activities, services, and the providers of those. The researcher portrayed them into figure 48 in agreement with her own judgement, which was based on findings obtained from interviews and questionnaires from data gathered during fieldwork 2013 and 2014. Thus, taking as a point of reference figure 53 map of the main ecotourism process of EcoAlberto, figure 56 has recognised who are the nodes and actors that participate in these processes. This figure maps out seven nodes and appoints the most important and specific actors among the EcoAlberto's TVC.

**Figure 48. Map of the Main Nodes and Actors of the Tourism Value Chain**



## **Account of EcoAlberto's Tourism Value Chain Nodes and Actors**

### **(1) Marketing, Publicity and Advertising**

EcoAlberto is in charge of its own publicity and advertising, services and products, sometimes the administration hires a tourism specialist from a community nearby, other times CDI offers one. According to data gathered from conversations and interviews (2013) EcoAlberto's marketing, publicity and advertising tools are the following:

- Online presence: EcoAlberto has its own website and social media where it promotes both parks; a short section on governmental websites such as CDI, RIH and SECTUR, and other small segments in a couple of tourism website's shared with other indigenous ecotourism projects, this websites include videos from multiple indigenous tourism projects in Mexico.
- Handouts, posters and fliers: handing out fliers and putting up posters along El Alberto's nearby roads, mainly the road going to Mexico City.
- Local media promotion: advertising on regional radio and television, and publicity in local newspapers and magazines.
- Promotional booths or stands: participating to indigenous fairs and gatherings with promotional stalls.
- Promotion with EcoAlberto's travel agencies (*Vivelo*, *Quinto Sol* and *Aventuras Nacionales*).
- Word-of-mouth: travellers that have visited the place have recommended the ecotourism parks to other people around the region, and so on (promotion people-to-people).

### **(2) Bookings and (3) Transportation**

These nodes are closely related, thus, bookings and transportation can be done through one of the travel agencies holding deals with EcoAlberto (e.g. *Vivelo*, *Quinto Sol*, *Aventuras Nacionales*) or directly with EcoAlberto's staff. Although, these travel agencies provide the services to EcoAlberto, results from data gathered in 2013 and 2014, this node is almost non-existent, given that tourists who arrive to EcoAlberto generally, employ their own transport (however, transport services may be used by some visitors in different occasions). Moreover, nodes 4, 5, 6, and 7, are the most important of the ecotourism experience; and as seen in figure 56, these occur under the umbrella of EcoAlberto as a self-reliant ecotourism agency.

#### **(4) Accommodation**

EcoAlberto offers traditional cabins made out local materials and a big area for camping, where tourists can rent or bring their own tents, and pay a small fee for the area. Thus, EcoAlberto's community service staff is in charge of keeping the cabins clean and having it ready for its use, and to look after the green camping area, while the administration looks out for the improvement of its infrastructure.

#### **(5) Food and Beverage**

There are two restaurants at EcoAlberto; food provided at the parks are mostly traditional Hñahñu food prepared by indigenous women with natural products grown and obtained locally. Furthermore, there are two small stores at the parks which sell snacks and drinks. Service providers at EcoAlberto's restaurant are the cooks, waitresses and janitors; and the service providers of the stores are the same as the suppliers, local people who own these stores<sup>22</sup>. Moreover, non-perishable products are cheaper to obtain in superstores (only available in bigger cities) than in the small convenience stores of El Alberto. For that reason, beverages such as sodas and fruit juices are not purchased locally.

#### **(6) Ecotourism Activities**

Ecotourism activities take place at EcoAlberto parks. Thus, after paying for an entrance fee, activities such as rappel, kayak, hiking, zip-wire and boat trips, are paid for individually. The providers of these activities or services are EcoAlberto's guides, which are part of the community service staff and have received proper training to lead tourists. It has been stated that community service staff do not receive a wage, but sometimes they receive tips from tourists.

#### **(7) Artisanal Souvenirs**

Independent Hñahñu artisans make artisanal souvenirs such as handicrafts and toiletries. EcoAlberto sells these products in the stores available at the parks. Although, artisans are unskilled Hñahñu people, regarded as the poorest of El Alberto (Fieldwork, 2014), traditional souvenirs and handicrafts remain among the most popular products offered at EcoAlberto. Even though the creation of each piece is time consuming, and also considered to be underpaid, handicrafts continue

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<sup>22</sup> EcoAlberto gives the space for local people to sell their products at the store, therefore, revenue gain at these stores, is a direct income for the people who supply it.

to produce revenues and are an important income for Hñahñu people without any other economic opportunities.

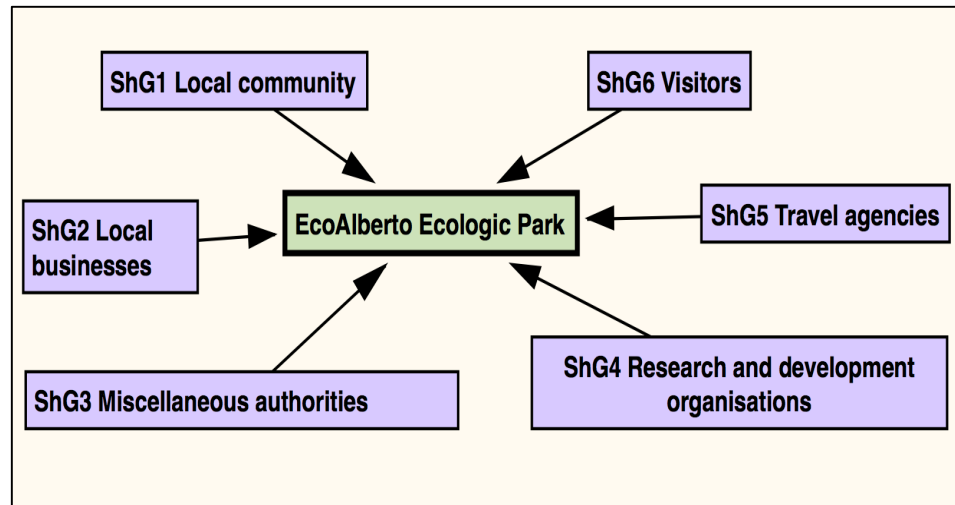
Therefore, accommodation, food and beverage, ecotourism activities and local products (all provided by EcoAlberto directly) are primary nodes of this tourism value chain. Thus, by illustrating nodes and actors, this map has started to shape the body of EcoAlberto's tourism value chain. Furthermore, these findings have also set out a clearer path to locate EcoAlberto's stakeholders.

#### **Step IV. Map and Analysis of Stakeholders**

Following step III where main nodes and actors of the ecotourism process were established and identified. This step (1) recognises and classifies key stakeholders into various groups according to their main activity at EcoAlberto and the local community; and (2) describes and analyses them according to their role and activities; (3) stakeholders are mapped within the EcoAlberto's tourism value chain; (4) raises issues perceived during the analysis.

As seen in ecotourism case studies reviewed in Chapter Four, researchers have the tendency to divide stakeholders into government agencies, private sector and the local community as the three key stockholders. In the case of the ecotourism development at El Alberto to place stakeholders into groups was rather a more complex activity, not only because most of these actors are equally important, but because many of them have multiple and diverse participation, particularly the as indigenous members of the local community, given that their roles are continuously changing. The results of the data gathered at El Alberto classified the key ecotourism stakeholders in six main groups, which were afterward divided by categories according to their activities and interests at the time.

Figure 49. Key Ecotourism Stakeholders at EcoAlberto: Main Groups



Source: author's elaboration based on data obtained during fieldwork (2013, 2014)

#### 4.1 Stakeholder Group 1: Local Community

When reviewing the tourism value chain case-studies, it is clear and expected that the local community is ultimately the main beneficiary in the development of community-based ecotourism projects; which is also the case at El Alberto, where the ecotourism company belongs to the Hñahñu community, who are directly and indirectly involved in the development of ecotourism policies and plans. This being so, the recipients and owners of EcoAlberto, are the prime stakeholders of the aforesaid venture. El Alberto and its Hñahñu community are ruled by a collective labour system and the company is registered as a society of social solidarity (see Step 1.1.1 Type of Business Entity) with the aim to employ the benefits and revenues obtained by EcoAlberto for goods and the needs of the local community .

The collective labour system (or social solidarity) employed at El Alberto consists that all Hñahñu members over eighteen years-old gain rights and obligations within the community. On one hand, they have the right to joining the 'collective' governance and management of all the land that belongs to the Hñahñu

community (not only El Alberto's land, but also territories around it); access to community services e.g. electricity, water, drinking water, etc.; the right (and obligation) to vote in meetings and assemblies regarding community affairs. On the other hand, obligations consist mostly in communal labour i.e. labour without payment, this type of labour such as one year of community service every eight to ten years at either of EcoAlberto's parks. Other obligations are building infrastructure around the communal land including new infrastructure or maintenance for EcoAlberto's parks, another of the main obligations are the *faenas* which are physically demanding activities, it can be the harvesting of vegetables, fruits, and construction activities.

Thus, El Alberto's collective system is a variation of the *cargo* system which holds the same principle as the collective system, where services are unpaid and a certain level of self-sacrifice of the members is required with very rigid labour standards (see table 15). The system has been practiced by many indigenous peoples in Mexico and South America after the end of the Spanish conquest (Zolla and Zolla 2004). Although, while the *cargo* system is based on political and religious beliefs where male members participate in a series of 'cargos' (positions) within a hierarchical system, El Alberto's collective system claims equality among members (that is male members) and acts without a hierarchical system.

*"We work united in one big group, there aren't members who control things or a solo leader, we are all equals"*  
-Adolfo, 40, Hñahñu Chief (Fieldwork, 2013)

Hñahñu chiefs and members with higher positions shared similar statements regarding the hierarchy of some of the members of the community compared to others. Moreover, they stated that members are equally important, thus, they all hold the power to elect chiefs, direct authorities and other administrations at El Alberto and EcoAlberto. However, the statement above is too general and perhaps contradictory, given that by "all" Adolfo, the Hñahñu chief, was referring only to men—all men—therefore, gender inequality is experienced by Hñahñu women in the context of the Hñahñu membership which includes rights and obligations. Furthermore, the acquirement of the Hñahñu membership in El Alberto is not well

explicit, but it is known that Hnahñu members are only men, therefore, the direct line to obtain the Hñahñu membership is from father to son, in consequence men cannot become members through marriage. Thus, for women to be acknowledge as members, they need to marry a man with the membership, being the daughter of a member is not enough. Nevertheless, this ruled has changed in the last few years for single mothers and widowers (i.e. heads of families), if they have no husband they are allowed to be acknowledge as Hñahñu members as long as they fulfil all obligations that men have to (e.g. *faenas*, community service, etc.)

*“We only have temporary roles, and that depends on the reputation that one’s built given the way one’s lived life at the community. People are the judge, our society; they judge you, and tell you at the (community) assembly ‘you’re going to have this role’ and if they all want you to, you can’t say no, because they know if you are qualified for the job, they believe in you.”*

*-Felix, 44, Hñahñu chief (Fieldwork, 2013)*

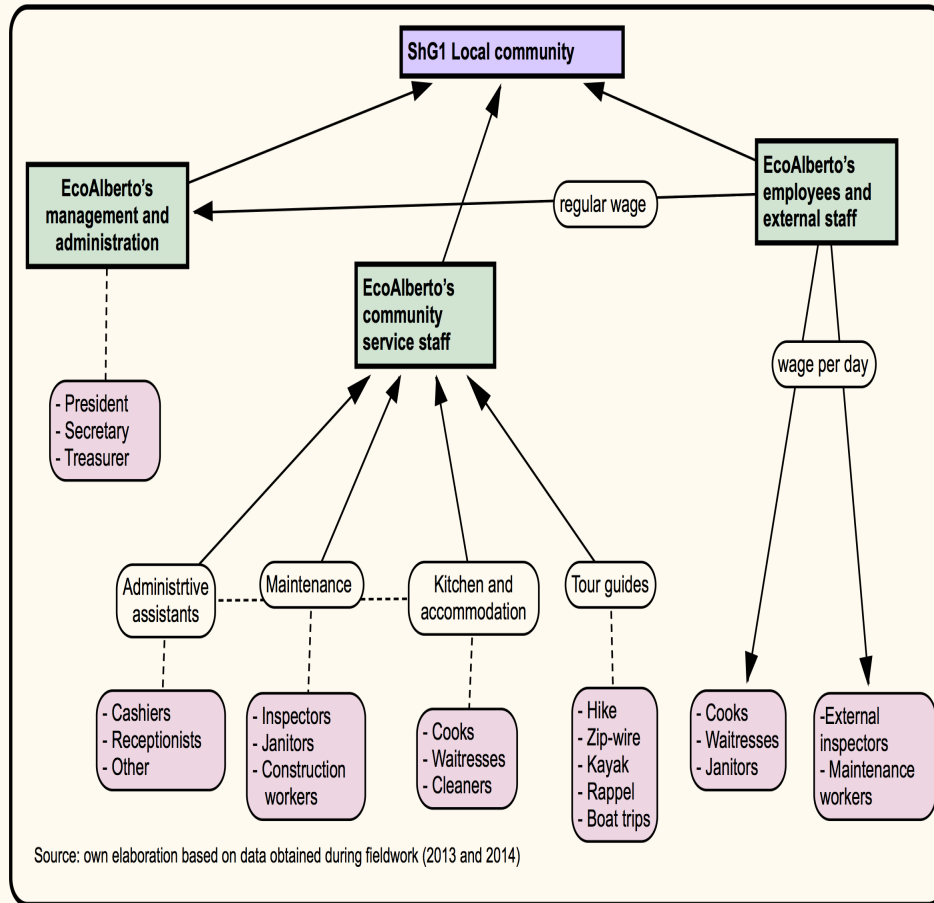
In agreement with the EcoAlberto’s chief’s statements (confirmed by the information gathered from interviews with locals), the researcher corroborated that Hñahñu members<sup>23</sup> of El Alberto are pivotal stakeholders, and the level of influence is sustained on the activity or role exercised in a certain period of time. Hence, any of them can be chosen for community service, *faenas*, etc., every eight to ten years, but only gender inequality remains regarding the highest positions, only male members can be Delegate of El Alberto; as well as Manager, Secretary and Treasurer of EcoAlberto’s parks. Thus, to clarify the influence of the locals as stakeholders, the researcher divided the local community stakeholder-group into three categories (see figure below).

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<sup>23</sup> Head of family male or female.



**Figure 50. ShG1 Local Community**



### **ShG1.1 EcoAlberto's Management and Administration**

Management and administration at EcoAlberto is integrated by: a president, secretary and treasurer (elected by the community assembly for a period of three years). They are in charge to lead, command, and inspect plans and decisions-made by the community assembly concerning ecotourism at EcoAlberto parks, particularly its further development and sustainability (table 50). In addition, it is among the administration's duties to be aware of any modifications or new implementation of tourism policies at national and regional levels, as well as changes within the tourism market that can have implications for EcoAlberto's business and sustainability e.g. the development of more ecotourism projects among the Mezquital Valley.

*"We (management and administration team) are in charge of many, many things, pretty much everything related to ecotourism and the parks; of course it is the community assembly who tell us what to do, but in the end we have to lead the community in things concerning our habitat, and to make sure that fellow members use the natural resources of the parks without harming our environment. Moreover, we have to elaborate and lead development plans to make sure we keep on business."*

*-Adolfo, 40, Hñahñu Chief, (Fieldwork, 2013)*

However, as stated earlier gender inequality remains regarding the highest positions, these positions cannot be held by women, not even those that are head of families and have completed a year of community service or constantly work on *faenas*.

*"We work because we have no husband to do it for us, thus, we have the right vote at the community assembly, as heads of our own families, when they discuss plans, yet we cannot be elected for important jobs."*

*Mary, 29, Community service (Fieldwork, 2013).*

According to Mary and other female staff completing their community service at EcoAlberto's Parks, there is no mandate nor regulation that indicates 'only' male members can hold higher positions in fact there is no gender acknowledgement at all neither male nor female, nevertheless, it is of common knowledge among El Alberto that women cannot be elected as delegates nor hold positions such as manager, secretary or treasurer of EcoAlberto's parks.

### **ShG1.2 EcoAlberto's Community Service Personnel**

As formerly referred, in El Alberto's collective labour system the community assembly appoints Hñahñu members (head of families) as community service personnel to support EcoAlberto's operations. This collective labour system functions under the rules of the community assembly in accordance with the Social Solidarity Societies Act (see Step 1 - 1.1 Type of Business Entity).

*"Doing community service is tiring, but someone has to do it."*

*-Miguel, 45, Community service (Fieldwork, 2013)*

*"We do all the work around here, even without getting paid..."*  
-Julio, 29, Community service (Fieldwork, 2013)

Hñahñu members of El Alberto have worked with this system since EcoAlberto's parks were established; they see it as their duty to the community, and in reciprocity for their labour they have the right to remain part of the community, and to have access to basic services. Chiefs of El Alberto and other Hñahñu members claim that when people work side to side (for a year), they tend to develop a special connection, in addition they argue that it serves as a good example for the young.

*"Community service is the main thing which keeps the ecologic parks running, we all have roles to fulfil in our society. I did my community service many years ago, and now I am the manager... it is tiring, yes, but it is worth it, to work for our community... it is our job to keep the community in good shape."*

- Felix, 44, Hñahñu chief (Fieldwork, 2013)

*"I bonded with all Hñahñu brothers during that year, we learned more about each other as we spent a lot of time together, I even started to like people that I did not like as much before... I think it's a great opportunity to realise that there is a role that you can play to help your own community, and be an example for the children, they see you, and they learn from you."*

-Adolfo, 40, Hñahñu chief (Fieldwork, 2013)

EcoAlberto's ecologic parks are considerably big and require a large personnel to keep the projects alive. Nonetheless, not everybody is so passionate about the community service duty, some Hñahñu members revealed (during one-to-one interviews) that they are dissatisfied with the year of service without payment, yet they have to cope with it.

*"My cousin offered money to the administration instead of coming to do the year of (community) service, so he could stay and work in the U.S., they did not accept it, instead they told him to save that money to live off during the year of service, but that was not enough to live off for a year! He has a wife and children to take care of, and after he did the service he had to look for another job, he didn't find it here (at El Alberto), thus, he went through the border again and it is very dangerous now... but if he had not done it, the life of his family would have been hard at the community."*

These Hñahñu members that have expressed their dissatisfaction with the community service, also argued that they do not disapproved the collective labour system overall, they only wish that the administration of El Alberto and EcoAlberto were more resilient with the rules and labour standards the year of community service (see table below).

**Table 15. Rules and Labour Standards of the Year of Community Service**

1. No paid labour during the community service
2. Full-time labour implicates:
2.1 Work the twelve months of the year, the seven days of the week
2.2 No holidays nor leave permits are allowed during the year of community services - except in very great circumstances such as illness.
2. Full-time labour implicates:
2.1 Work the twelve months of the year, the seven days of the week
2.2 No holidays nor leave permits are allowed during the year of community services - except in very great circumstances such as illness.
3. A full working day implicates:
3.1 Normal schedule: starting community service at 7.00 am and finish at 23.00 hrs. - with some exceptions
3.2 On Saturdays or any other days when the personnel is performing 'the night walk' hike personnel begin their community service at 7.00 am and finishes at the end of 'the night walk' hike - 1.00 or 2.00 am of the next day.
3.3 Personnel is expected to attend work on Sundays (and any other day after 'the night walk' hike) in a normal schedule (7.00 - 23.00 hrs.).
3.4 Any Hñahñu member that does not showed the for community service, <i>faena</i> , community assembly or arrives late will be fined from \$500 - \$1,000 pesos (per occasion).

Source: author's elaboration based on data obtained during fieldwork (2013, 2014)

Hence, as illustrated on the table above, it is clear that there are no practical labour standards for the community service personnel working at EcoAlberto and at the local community. Nevertheless, as stated on the rules of the Social Solidarity Societies Act (see Step 1 - 1.1 Type of Business Entity)

EcoAlberto's personnel cannot not use salaried personnel. Yet, Hñahñu members *per se* agreed freely on the modalities of their activities, they committed to work for social purposes under the regulations voted at the community assembly, that was perhaps a long time ago, when everything started. Thus, the rules remain if there are some members that wish to change it, they need to put it to a vote at the community assembly.

EcoAlberto's personnel usually assist in more than one activity within the parks. Hence, as pointed out in figure ShG1, EcoAlberto's activities and operations are divided in four main categories. In consequence, the community service personnel is considered as one of the more important stakeholders, given that they constitute about 95% of EcoAlberto's human resources. Their interests are the sustainability of EcoAlberto, so part of its revenues can be beneficial to the local community; to secure a place as Hñahñu members of El Alberto, and to have access to community services.

### **ShG1.3 EcoAlberto's Employees and External Personnel**

Labour at EcoAlberto's parks must be fulfilled by the partners, except, when partners cannot do a certain task, in that case professional or specialised services are required, and these may be contracted or provided occasionally or on a temporary basis as stated on the rules of the Social Solidarity Societies Act (see Step 1 - 1.1 Type of Business Entity). Therefore, there are only two types of employees who receive remuneration for their services at the ecotourism parks (see ShG1.1): (1) semi-skilled employees with a fixed payment: president, secretary, and treasurer and; (2) semi-skilled and non-skilled employees with a non-regular payment. Non-skilled employees are kitchen staff e.g. cooks, waitresses; and semi-skilled employees are external personnel hired occasionally for the maintenance of the parks. Thus, as they do not work on a daily basis, they are paid by day of labour.

*"We are paid when we work... I make \$200 pesos (US\$ 15) per day when I work, and Karen makes \$150 pesos (US\$ 12), plus some tips that visitors give us. Thank god we have worked every day during this summer."*

*- Malena, Cook, 31 (Fieldwork, 2013)*

*“Yet, now they (EcoAlberto's administration) don't need us (waitresses) every day, because there are others here doing 'the service' and they don't pay them, so I only come on the weekends.”*

*- Rosita, Waitress, 27 (Fieldwork, 2013)*

Hence, the number of cooks and waitresses is considered depending on booking numbers during the week and weekends e.g. these can be nine or more cooks and waitresses during holidays or high season, whereas in low season only two may work daily. On the other hand, external staff assists with sustained check-ups of the ecologic and water park's equipment on weekends; once or twice per month, or simply when needed.

Employees in any company are important stakeholders, however in the case of EcoAlberto these are not as important as the personnel doing their community service. Excluding EcoAlberto's administration and maintenance (classified already in ShG1.1) the rest of the employees have no added influence over any other local person, since they can easily be replaced by a member of the community service personnel. Thus, hard labour rules and policies of the collective labour system (reviewed in the previous section) do not apply to employers and external personnel, only to the members doing the year of community service.

Furthermore, as outlined in table 15 (p.214) the issue that probably concerns most of the employees is the low numbers of visitors, since they have temporary jobs, this could be shortened even more. In consequence, temporary workers are normally involved in various activities to earn more money.

*“Well, I can't only work here, there is not enough work for me here if they have Juana and Karen, you see? So, some days I stay at home and make ixtle<sup>24</sup> handicrafts for the Ya Muntisi Behña cooperative, and other days I go to Ixmiquilpan to sell the (traditional) food that I make from the nopales (cactuses) and other vegetables that my husband harvests.”*

*- Malena, 31, Cook (Fieldwork, 2013)*

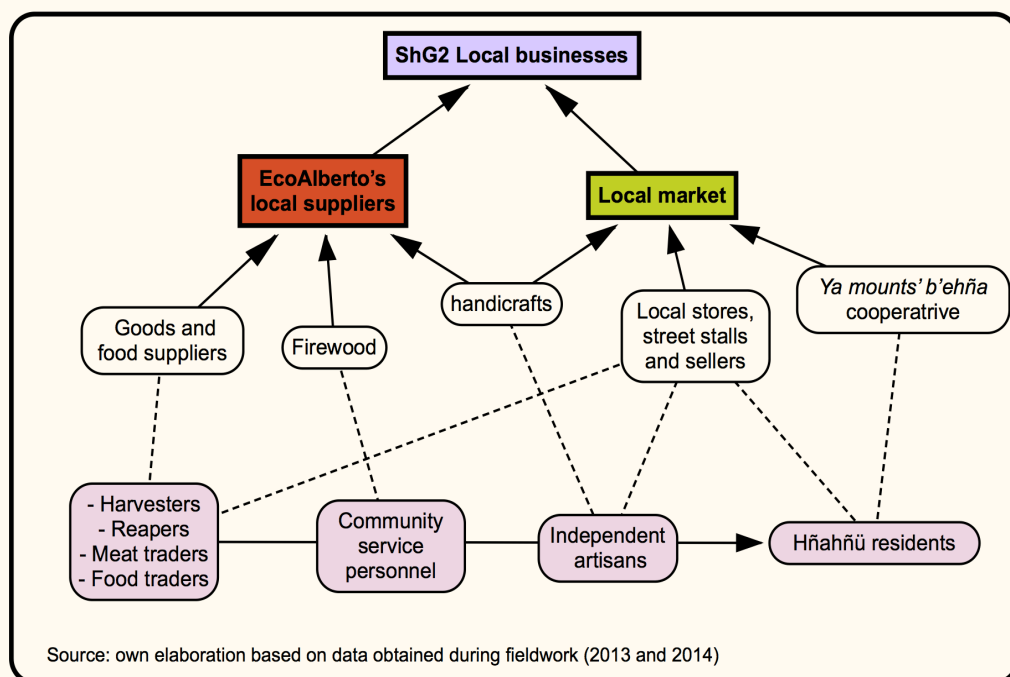
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<sup>24</sup> The fibre of maguey (a type of cactus)

## 4.2 Stakeholder Group 2: Local Businesses (Private Sector)

Local businesses at El Alberto are slightly separated in (1) EcoAlberto's local suppliers, and (2) the local market. Although, they are interlinked to a great extent it is important to distinguish which business supply both, EcoAlberto and the local community, and those private businesses that supply only one of them. That is, to know who receives direct and indirect benefits from the tourism activity (the figure below shows the beneficiaries in the boxes filled by a light pink colour).

Figure 51. ShG2 Local Businesses



Thus, local and private businesses provide EcoAlberto's parks and the domestic market with all sorts of supplies obtained locally; and as the majority are involved within the tourism activity (directly or indirectly), their interests regarding the growth of tourism at EcoAlberto are high.

*"We supply to EcoAlberto, sometimes more than other times, but at least we know that every weekend they are going to need meat, fruits and vegetables, and those weekends help me to gain the income, that many times I don't get during the week at the local market... and it is the same for stall and street sellers that go sell their stuff at the entrance of the parks, on weekends they have the opportunity to earn more money."*

*-Jose Luis, 56, Food trader (Fieldwork, 2014).*

Although these are micro businesses (i.e. many locals may work on their own), as part of the local private sector, generate improvement on the community's economy, given that these private businesses are one of the main sources of income and employment for the Hñahñü inhabitants, especially among the poorer. Therefore, local businesses are concerned with the sustainability of EcoAlberto's parks, and the proliferation of ecotourism to increment visitor's numbers, not only at EcoAlberto, but also at the community.

*"Our products are not sold at EcoAlberto's stores, but many visitors that come to visit the parks, also come pass to our cooperative, our main business is to export our traditional handicrafts to big companies like the Body Shop in the UK, but selling to tourists is good for those periods when we are not supplying these companies.*  
*-Amada, 55, Ya Mounts'b'ehña Cooperative (Fieldwork, 2013).*

The statement above explains plainly why tourism demand and visitors' spending have implications beyond EcoAlberto, even though the scope of the ecotourism activity is mostly within the ecologic parks, visitors sometimes wander around the local community, and that benefits local businesses. For instance, given the demand of artisanal products by tourists visiting EcoAlberto's parks, Hñahñü women have created small business, perhaps, the most evident example of female empowerment is the case the Hñahñü artisans which formed a sustainable enterprise for the benefit of their families, and the region. These type of private business allowed them to create an income, while preserving on their culture and traditions. The group of approximately 317 women from El Alberto (and other neighbouring communities) from the Mezquital Valley, formed the *Ya Munts'b'ehña* Cooperative, a private micro enterprise that exports its products made in the traditional manner of maguey (or *ixtle*) to the UK. This small company has join other micro enterprises led by indigenous women from other regions of Mexico under the brand *Corazon Verde* with headquarters in Mexico City.

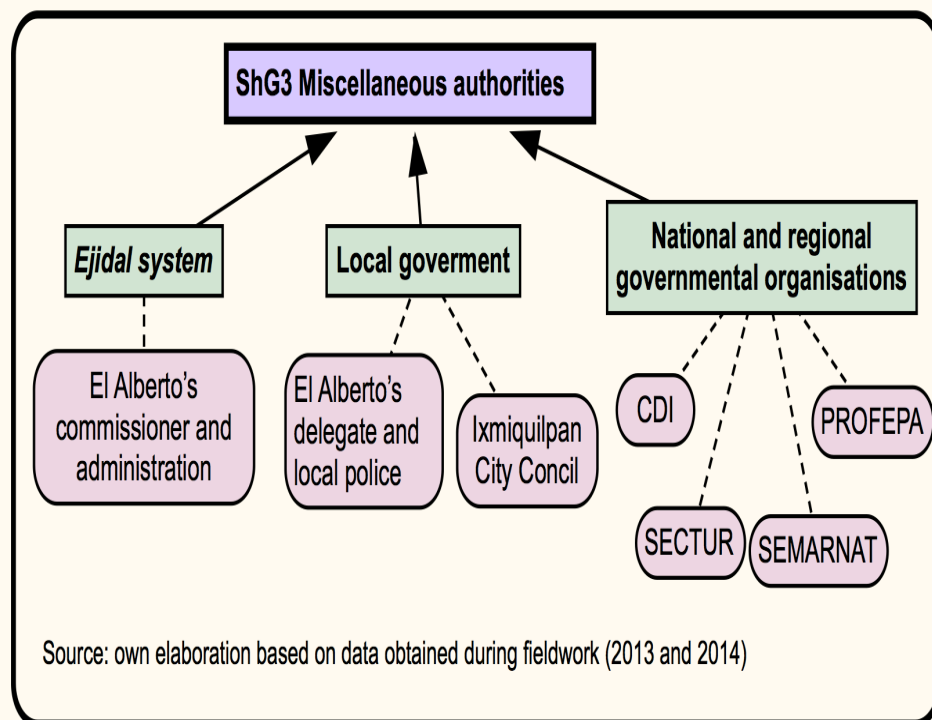
As EcoAlberto's stakeholders, local and private business (figure 52) are mostly concerned the insufficient demand for their products and services. Given that these businesses can only act as EcoAlberto's suppliers to a certain extent, and there is also a range of merchandise that cannot be acquired locally (e.g. maintenance products, recreational and sports equipment).



### 4.3 Stakeholder Group 3: Miscellaneous Authorities

Authorities are major stakeholders when referring to their role on ecotourism and the sustainable development of indigenous communities. In the case of El Alberto, local, regional, and national authorities are highly interested to employ alternative tourism and ecotourism operations as mechanisms to enhance the economy, revive the culture, reduce poverty, at the local community level to stop the inhabitants from leaving the community. To better identify the crucial roles among miscellaneous authorities at El Alberto, these stakeholders have been divided into three subgroups shown in the figure below.

**Figure 53. ShG3 Miscellaneous Authorities**



### ShG 3.1 *Ejidal* System

El Alberto's Commissioner and administration are a committee formed *ad hoc* to deal with issues that arise within the local community<sup>25</sup>. Although, they are a form of authority, they are not part of any government institution, an *ejido* is a communal land. Alternatively, commissioner and administration are elected directly by Hñahñu members from El Alberto at the community assembly. Moreover, as an executive body it is their duty to follow and implement the decisions and policies made by the community assembly.

*"El Comisariado (the Commissary) is like the indigenous police for us. He and his team have to deal with the issues raised at the community assembly, we all respect him as the Hñahñu authority that he represents."*

*- Felix, 44, Hñahñu Chief (Fieldwork, 2013)*

The commissioner and administration are also involved in all phases concerning new development plans and implementation of infrastructure at EcoAlberto. Additionally, their interest in ecotourism operations refers to how these affect and/or benefit the well-being of the community, in particular to cease the migration of El Alberto's inhabitants to the U.S, through the alleviation of poverty and the revival of the Hñahñu traditions and culture.

The collective labour system is a branch of the *Ejidal* system. This system manages more than labour, it is also in charge to find a balance among the Hñahñu members, such as finding economic opportunities, access to their land and the proper use of the natural resources. The collective labour system employed at El Alberto has some similarities to *cargo* systems employed in some indigenous communities from other regions of Mexico and Latin America, for example to continue on being active members of the community, the inhabitants must work in *faenas* and also one year of community service at EcoAlberto's parks. Nonetheless, one of the main differences between *cargo* and collective labour, is that the first is ruled by a sort of civil and religious hierarchy system, and the latter (at El Alberto) claims not to have a hierarchy system.

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<sup>25</sup> As an *ejidal* state member of the communal land they have control over the land and issues among their own members. The government does not get involved unless it is absolutely necessary.

### ShG 3.2 The Role of the Local Government

El Alberto is a small indigenous community that has two authorities at a local level. On the one hand, there is El Alberto's delegate and the local police. The delegate is the principal authority at El Alberto and has the role of resolving conflicts within the community and forms part of the government chain of command, who responds to Ixmiquilpan City Council<sup>26</sup>.

*"The municipal Delegate is the most important authority here (at El Alberto), he has the power of the (governmental) authority and is the representative of Ixmiquilpan's Mayor here."*

*- Noelia, 80, Hñahñu member (Fieldwork, 2013).*

Furthermore, the role of the Ixmiquilpan City Council is to plan, promotes, and encourages social, administrative, and economic actions, with the end of promoting ecotourism in EcoAlberto parks, besides, the city council provides EcoAlberto some training to improve and develop skills (e.g. administrative, technological, etc.) needed to manage and operate the venture.

*"El Alberto has changed since the development of the ecotourism project, and its ecotourism benefits the entire region, we have seen poverty reduction at El Alberto, and that's one of the aims of our government (Ixmiquilpan), to serve and help people"*

*- Martha, 35, Ixmiquilpan City Council (Fieldwork, 2014)*

On these grounds, the city council seeks the preservation of the natural resources at the ecologic parks, and an excellent performance of ecotourism services. Among its interests are: to maintain a smooth relationship with the commissary administration through the delegate; and to promote traditional, indigenous, and environmentally friendly tourism while increasing the well-being of the community. Therefore, these authorities (the Hñahñu Commissioner, El Alberto's Delegate and Ixmiquilpan City Council) have different roles to play, but they work closely in their assignments to achieve mutual objectives, as Roberto (Fieldwork, 2013) remarked *"each administration has their own team, but we are all immersed with each other."*

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<sup>26</sup> Legislative body of the area to which El Alberto belongs.

### ShG 3.3 The Role of the Regional and National Government Organisations

It is of common knowledge that governments have the capacity, and the means to make and improve, policies, plans, and even laws about a particular subject, to set their national objectives. Given the versatility of El Alberto's ecotourism project there are various departments and ministries that act as stakeholders on this project at different levels: local (see ShG 3.1 and ShG 3.2), regional, and national level. However, there are only a few governmental organisations (e.g. departments and ministries) in particular that share substantial stakes within this project (figure ShG3).

The National Commission for the Development of Indigenous Villages (CDI), has the most important role among all governmental organisations in regard to public policies towards the sustainable development of indigenous communities in Mexico. In the case of El Alberto, the role of the CDI is to promote the rights of Hñahñu traditions and culture, and has also helped the local community by granting financial support for the development of EcoAlberto through the Agroecology and Ecotourism Program 2002-2004, the Ecotourism Program in Indigenous Zones (PEZI) in 2006, and the Program for Alternative Tourism in Indigenous Zones (PTAZI) in 2007-2008 (CDI, 2014).

*"CDI supports the development of tourism projects in indigenous communities, in five stages, we have received all the funds already, though they come time to time to provide some new trainings and they promote our project on their events and on their website."*

*- Ximena, 18, Community service (Fieldwork, 2013).*

Hence, CDI has been involved with the ecotourism project in other ways besides granting financial support, and since the last program to grant financial aid concluded in 2008, this institution has kept its presence by providing occasional training for the development staff's skills, and giving EcoAlberto promotion and publicity among the social media. Yet, now that the financial support has ceased, CDI's main interests are: First, the sustainability of the project, it is important for the CDI to prove to the government that projects like EcoAlberto can be profitable unassisted; to contribute to the argument that ecotourism projects under their programs can be successful. Second, to preserve Hñahñu traditions and culture; and to eliminate discrimination towards indigenous peoples. Third, the enhancement of the economy to reduce poverty to stop Hñahñu people from migrating to the US.

Furthermore, there are other ministries involved but, with less participation such as: (1) the Ministry of Tourism (SECTUR), that plans and promotes EcoAlberto's services through various ministries and departments within the government, and its main interest is to see EcoAlberto recognised as a reliable ecotourism provider; (2) the Ministry of Environment and Natural Resources (SEMARNAT) concerned with the conservation and the protection of El Alberto's natural resources; and the Federal Attorney of Environmental Protection (PROFEPA), that has participated at EcoAlberto in partnership with CDI in the implementation of Agroecology and Ecotourism Programs. Moreover, PROFEPA's interests are related with the aforesaid ministries as well as improving the sustainability of EcoAlberto's parks (and the local community).

Additionally, fourteen governmental organisations<sup>27</sup> agreed and signed the 'General Inter-Institutional Collaboration for Ecotourism and Rural Tourism Development in Mexico' (Sedatur, 2007) yet, they have failed to assist in enabling the environment for the development of indigenous ecotourism. For instance, out of those fourteen institutions there probably were three or four that were really involved within the project, and only one (CDI) was really committed. Furthermore, SECTUR, the main organisation promoting the development of tourism in Mexico is hardly involved with this type of tourism (i.e. indigenous, rural, and community). Instead it falls on CDI, and SECTUR is only involved to provide publicity to the destinations in national or regional television, and on social media. SECTUR staff argues not to have enough funds for projects, and that their focus area is mostly culture tourism rather than ecotourism or indigenous tourism.

*"SECTUR... hmmm no really, they have not given us anything, all you see here is done by CDI, but sometimes they (SECTUR) invite us to festivals, and events and they come here to take pictures and videos."*  
- Adolfo, 40, Hñahñu Chief (Fieldwork, 2013)

Other issues include the infrastructure provided by SEMARNAT, according to the Commission for Environmental Cooperation (CEC, 2015), the Ministry of Nature and Natural Resources of Mexico provided "poorly designed septic tanks" at El Alberto and EcoAlberto Water Park.

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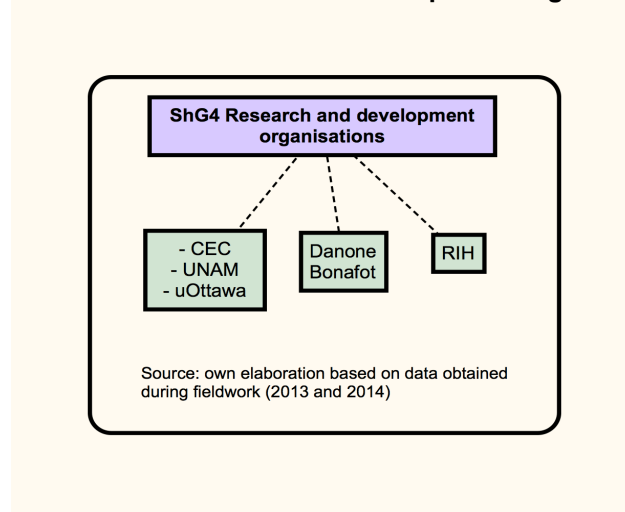
<sup>27</sup> SECTUR, SEMARNAT, SAGARPA, SEDESOL, SE, SRA, CDI, CONANP, CONAFOR, FONATUR, INAH, CPTM, FINRURAL and FIRCO (Sedatur, 2015)

Yet, regional and national government organisations have (overall) positively influenced ecotourism development at El Alberto through the enactment of national policies and programs particularly created for indigenous peoples.

#### 4.4 Stakeholder Group 4: Research, Development and other Organisations

Research and development companies, as well as other non-governmental organisations, that have supported and financed projects at the Hñahñu community of El Alberto. Even though these NGOs have supported the development of ecotourism, this is only as a secondary goal, given that some of them have expressed that their main focus was not the ecotourism project as such, but rather to aid the local community. However, the previous projects like these have already generated indirect benefits to EcoAlberto, hence, as it appears in table 15 (p.xx) research and development organisations are considered in average as medium influence.

**Figure 54. ShG4 Research and Development Organisations**



- (1) The Commission for Environmental Cooperation (CEC)<sup>28</sup> in partnership with the National Autonomous University of Mexico (UNAM) and University of Ottawa (uOttawa) have included EcoAlberto within their North American Partnership for Environmental Community Action (NAPECA) project “Community improvement of sanitation, farm, tourism and ecological

<sup>28</sup> Trinational (Canada, Mexico, U.S.A.) organisation created in connection with NAFTA to address regional and environmental issues.

services for sustainable development in the Hñahñu indigenous community of El Alberto, Ixmiquilpan (Hidalgo, Mexico).” According to Ms. Schmidt (2015) coordinator of NAPECA “the project is focused on the sanitation (water) and reforestation (soil) activities, rather than on ecotourism.” However, the project has granted financial support to EcoAlberto (CEC, 2015) for the sustainable development of the ecologic parks. Therefore, CEC interests reflects on NAPECA in the vicinity of El Alberto are: (1) to intervene within the ‘modern’ development that has resulted in the exploitation of the ecosystem; (2) to assist the local community to manage their resources in a sustainable manner; and (3) to improve the economic share of the benefits derived by EcoAlberto, ecotourism and similar activities.

- (2) Danone, a multinational food-products corporation, in partnership with Bonafont <sup>29</sup> and CDI have granted EcoAlberto with the project Danone Communities. Thus, Danone and Bonafont are big international companies but, act as development organisations at El Alberto and the Mesquital Valley.
- (3) Indigenous Hñahñu Network (RIH) is the first network formed by Hñahñu micro enterprises, it was born as a ramification of the Indigenous Network for Alternative Tourism of Mexico (RITA). Thus, while RIH is focused particularly on Hñahñu people from Hidalgo, RITA works with all the indigenous groups of Mexico. Nevertheless, they share the same interests: the promotion of indigenous rights, heritage and biodiversity; the sustainability of their natural resources, the promotion of their biodiversity and indigenous heritage; and the integration of a commercial network for indigenous products and services.

As it can be seen in table 15 (at the end of this step), these organisations are considered to have a high influence, perhaps not the organisation *per se* (CEC, Bonafont), as they only carry out temporary projects, but rather they are altogether in the big picture. Hence, organisations that have already given support (Danone), organisations that are currently investing (CEC), and organisations that participate regularly (RIH) among ecotourism and sustainable development projects at El Alberto are interested not only on the impact of ecotourism, but also on the impact of their own research or participation to know that they really achieve their objectives.

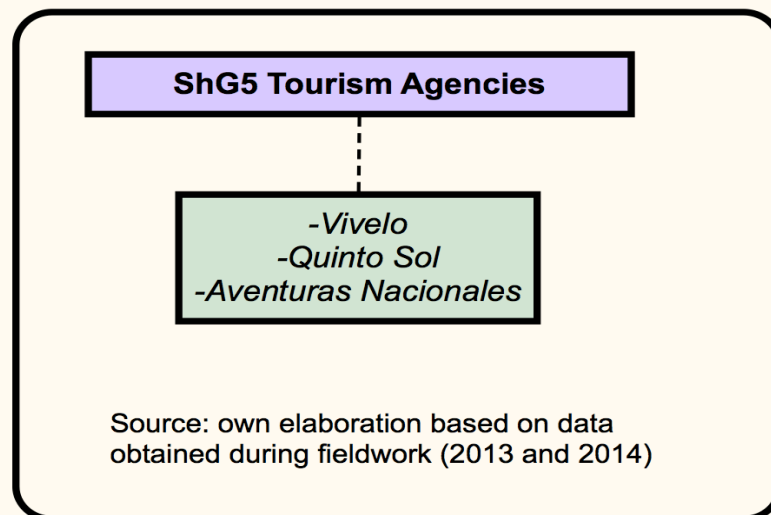
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<sup>29</sup> A Mexican bottled water enterprise that forms part of the Danone Corporation.

#### 4.5 Stakeholder Group 5: Travel Agencies

EcoAlberto holds agreements with three travel agencies: *Vivelo*, *Quinto Sol* and *Aventuras National* (figure 65), yet as mentioned in earlier sections of this case study, EcoAlberto is not reliant on travel agencies for its survival, or to attract tourists, instead these are considered as low influence stakeholders. Although, agreements between EcoAlberto and travel agencies need to be developed further, it is within the interests of the agencies for the continuous improvement of EcoAlberto's services and products to increase bookings and tourism rates.

Figure 55 ShG5 Travel Agencies

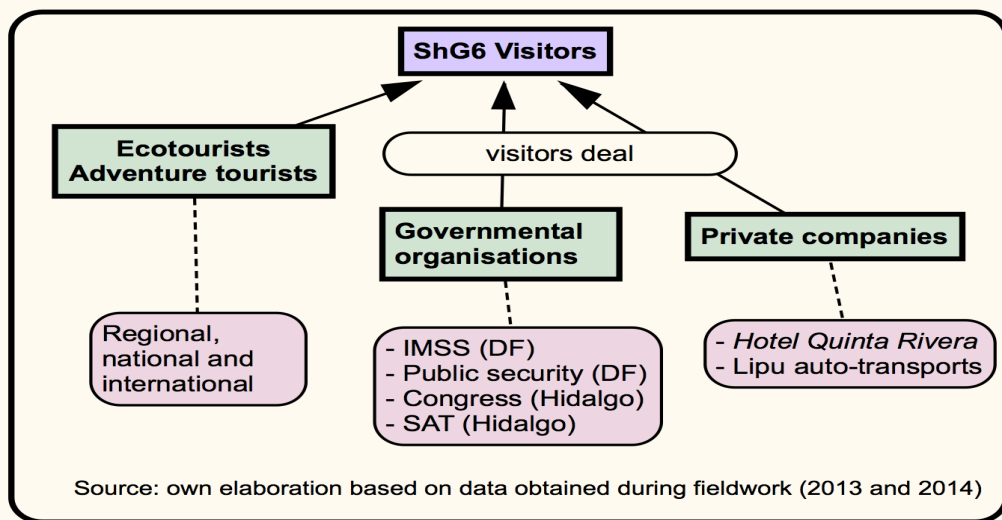




#### 4.6 Stakeholder Group 6: Visitors

Visitors such as ecotourists and adventure tourists are established as high influence stakeholders at El Alberto (see table 15). These tourists spend money when visiting the ecologic parks and when they engage into activities. These incomes provide direct and indirect benefits to the local community, and without their expenditure or payment of fees at the parks the community ecoproject will fail. The interest of visitors can vary given the diverse attractions provided at the destination, however according with the interviews carried out they are mostly interested in enjoying the nature scenarios while practicing adventure sports such as kayaking and rappelling. Moreover, tourists also enjoy experience of traditional and cultural activities.

Figure 56. ShG6 Visitors



Furthermore, EcoAlberto has agreements with certain governmental organisations, and private companies (figure 56). The agreement suggests that each company or organisation, has to bring two groups (at least) a year of their personnel to visit EcoAlberto and they would be given a 15 - 20% discount. These agreements were planned to encourage more people to visit the parks every year. In spite of that, lack of visitors throughout the year remains the biggest issue for the ecologic park.

Table 16. Key Stakeholders of Ecologic Park EcoAlberto

Stakeholder	Description	Role	Interests	Issues perceived	Resources
Indigenous community El Alberto	EcoAlberto's board	To grow and increase the share of the benefits directed to the local community.	EcoAlberto's accommodation, infrastructure, environmental protection, indigenous culture and education, safety, and good experience for tourists.	It seems that only men can be members; changes every 3 years.	Access and authority over EcoAlberto's grounds.
	EcoAlberto's employees	To grow and increase the share of the benefits directed to the local community.	EcoAlberto's accommodation, infrastructure, environmental protection, indigenous culture and education, safety and good experience for tourists.	Labour shortage and work is not stable.	Ecotourism services, food, construction workforce.
	EcoAlberto's community service staff	To grow and increase the share of the benefits directed to the local community.	To secure a place among the indigenous community and access to community services.	Community service (mandatory) and working excessive hours.	Ecotourism services, food, construction workforce.
Local businesses	Non-tourism sector Local businesses Suppliers Street vendors	Right to vote and participate in any plans or decisions concerning EcoAlberto.	Enhancement of the quality of life, through direct and indirect tourism expenditure.	Lack of interest in the context of decision making.	Provide inputs for EcoAlberto like food supply chains, and handicrafts.
Tourism support government organisations and agencies  (Source: author's elaboration)	CDI	Support EcoAlberto through the use of different tools; and to reduce poverty among the Hñahñu community.	Partly supporting the creation of infrastructure; providing training and education; Impact on poverty reduction and the sustainability of the ecotourism project.	Lack of involvement and insufficient monitoring.	Start-up grants for infrastructure and other grants through stages; and skill training for staff.
	SECTUR SEMARNAT CEC	Provide EcoAlberto support, better information, and contacts.	Rates, increase the numbers of visitors and tours booked, and the quality of the experience.	Lack of involvement.	Capacity to increase visitor numbers.
	<i>Vivelo, Aventuras Nacionales, Quinto Sol.</i>	To make a profit by bringing tourists to EcoAlberto	Rates, increase the numbers of visitors and tours booked, and the quality of the experience.	No access to the parks, increase rates.	Capacity to increase visitor numbers.

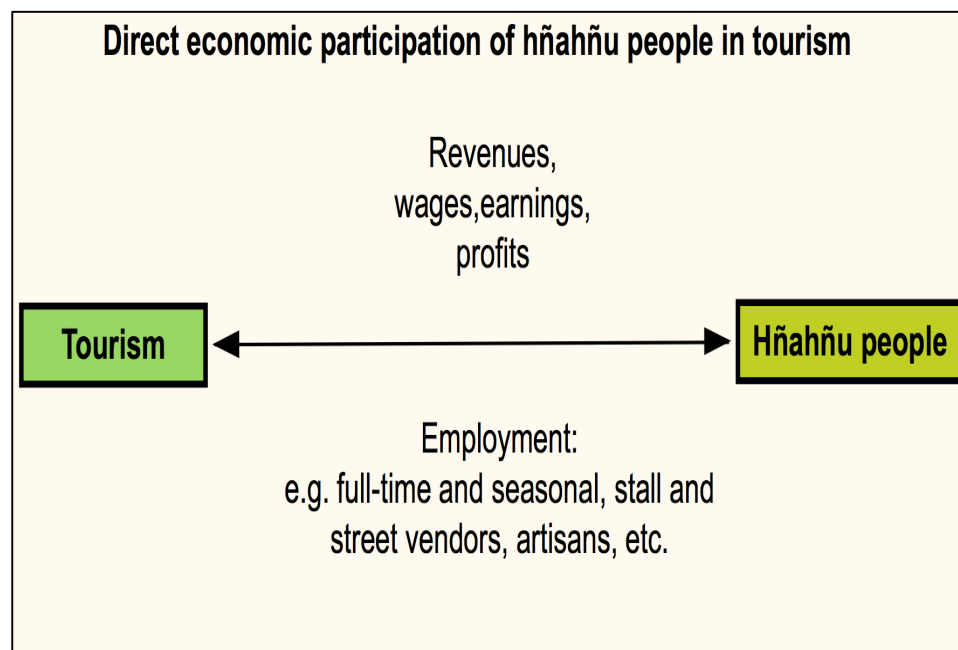
## Step V. Map the Economic Participation of Hñahñu People along the TVC (Financial Benefits)

At this point, it has already been acknowledged that Hñahñu members are highly committed to EcoAlberto as a community project; however, it has also been observed that not all of these members receive an income for their services. Therefore, this section analyses where Hñahñu people earn revenues along El Alberto's tourism value chain, by separating them into two categories: direct and indirect economic participation.

The following data was collected from interviews and questionnaires with EcoAlberto's employees and Hñahñu people working at the local market (Fieldwork, 2013, 2014).

### Direct Economic Participants of Hñahñu People in Tourism

Figure 57. Direct Economic Participants of Hñahñu People in Tourism



Source: author's elaboration based on ITC, 2009

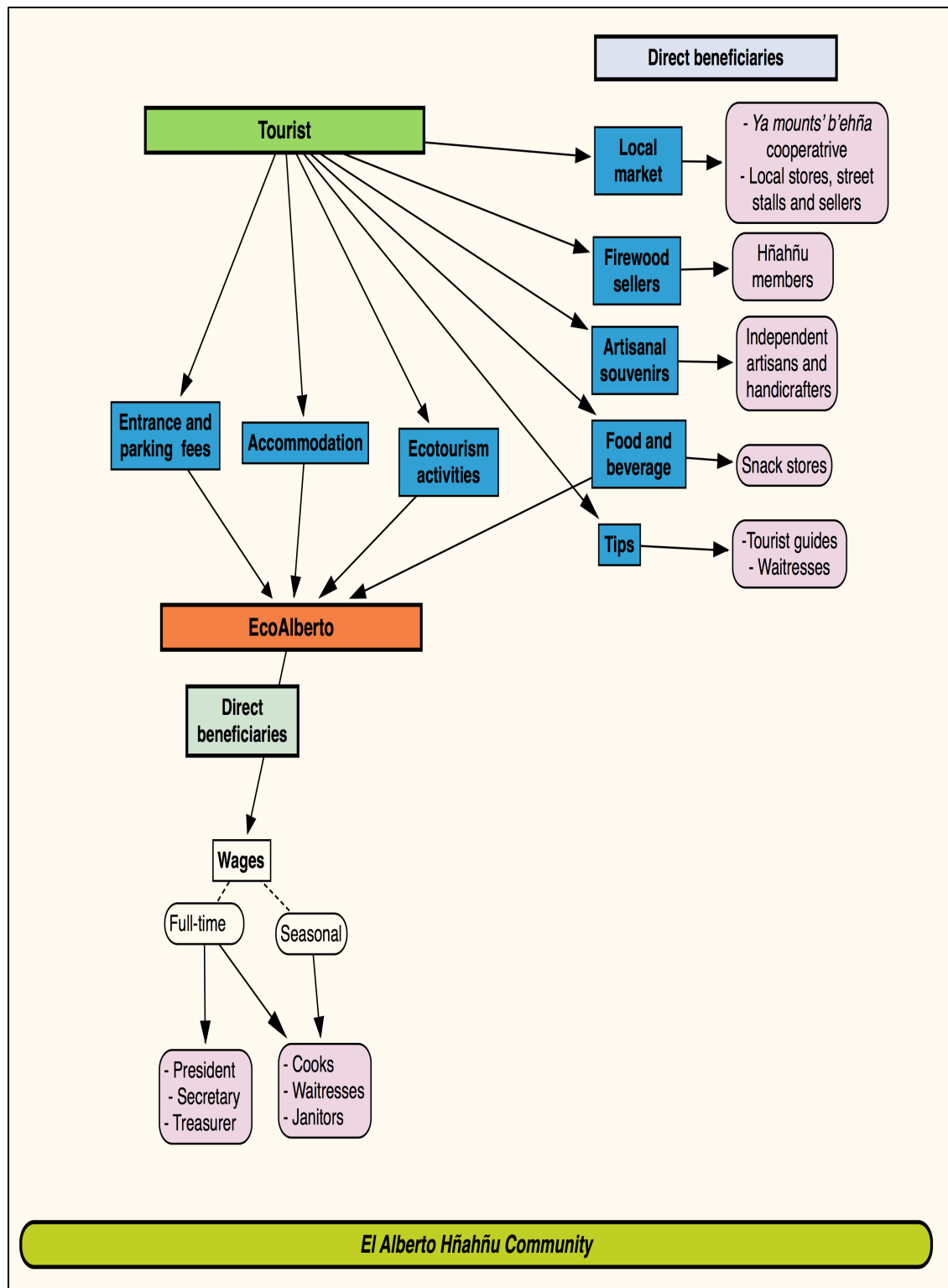
Direct participants are (1) employees who earn wages at EcoAlberto, and (2) Hñahñu inhabitants who sell products and handicrafts to tourist one on one, inside and outside EcoAlberto (see figure 57).

(1) Vendors inside EcoAlberto are Hñahñu people who own and supply the park's stores, and independent artisans who sell their handicrafts there, and firewood sellers.

(2) Vendors at EcoAlberto's entrances e.g. stall and street sellers; and micro business at El Alberto's local market such as *Ya mounts'b'ehña* the women's handicraft cooperative, and other convenience stores.

Figure 68. Map of the Tourist Expenditure at El Alberto; Hñahñu Direct Economic Participation (below) has mapped the direct expenditure of tourists at El Alberto. Thus, arrows going from the green box on top to the boxes in blue are pointing out to the activities and services in which tourists tend to spend money to obtain the ecotourism experience. The direct beneficiaries of this tourist expenditure are described below along with estimated numbers of the revenues that they earn in average for selling products or providing services.

Figure 58. Map of the Tourist Expenditure at El Alberto: Hñahñu Direct Economic Participation



Source: author's elaboration based on fieldwork (2013, 2014)

### EcoAlberto's Employees

There are about seven to ten employees at EcoAlberto on average (unskilled and skilled). The president and manager of EcoAlberto holds a bachelor's degree and earns MX\$ 12,000 (US\$ 923) per month (p/m) and has a budget MX\$ 8,000 (US\$ 615) p/m for travelling expenses. The secretary and treasurer hold administrative certificates from technical schools and each earn MX\$ 10,000 (US\$ 769) p/m. On the other hand, unskilled employees are paid less than skilled employees. Kitchen and cleaning personnel are two cooks and two janitors, thus one cook and one janitor work at the ecologic park, and the other two work at the water park. As seen in table 16, two cooks receive a wage of MX\$ 5,600 (US\$ 431) p/m, while janitors earn MX\$ 4,200 (US\$ 323) p/m.

In addition, EcoAlberto hires extra workers during weekends, holidays, or high season (summer vacations). For instance, during weekends the parks are in need of more kitchen and cleaning personnel (e.g. cooks, waitresses, janitors). These are paid the same rate as the permanent personal, but per day of labour (p/dl). Thus cooks earn MX\$ 200 (US\$ 15) p/dl, while janitors and waitresses earn MX\$ 150 (US\$ 12) p/dl, maintenance workers are needed to check on EcoAlberto's equipment and these come twice a month and charge about MX\$ 150 (US\$ 12) p/dl.

Table 17 estimates the wages of the permanent and seasonal employees per month and per day of labour in 2012 and 2013.

Table 17. Permanent and Seasonal Employee Wages at EcoAlberto 2012 and 2013

Employees	Permanent per month	Seasonal per day of labour	Gender
President	MX\$ 12,000 - US\$ 923		1 M
Treasurer	MX\$ 10,000 - US\$ 769		1 M
Secretary	MX\$ 10,000 - US\$ 769		1 M
Cooks	MX\$ 5,600 - US\$ 431	MX\$ 200 - US\$ 15	2-4 F
Janitors	MX\$ 4,200 - US\$ 323	MX\$ 150 - US\$ 12	2-4 F
Waitresses		MX\$ 150 - US\$ 12	2-4 F
Maintenance workers		MX\$ 150 - US\$ 12	1 M

M: Male F: Female

Source: author's elaboration based on fieldwork (2013, 2014)

Supplementary sources of direct income for some employees are tourist's tips and firewood selling. First, tips given by tourists are mainly to waitresses, cooks and tourist guides; in Mexico, tips' rates at restaurants are between 10-15% of the overall cost of the meal. There is a lack of records within the subject yet, interviews and questionnaires among EcoAlberto's staff and visitors (Fieldwork, 2013, 2014), helped to estimate that tourists by nationality tended to tip differently.<sup>30</sup> Domestic and European tourists, do not leave tips very often, but those who did, left among 10-12%. American and Latin American tourists tipped between 12-13%, while Canadians tipped between 12-15%. In addition, some tour guides have reported to have received tips from time to time, between MX\$50 - MX\$100 (US\$ 4 - US\$ 9) per couple or group. Even though tips are rare, these still create revenues for indigenous peoples.

*"Mexican and European people are not good tippers, but sometimes they do leave some pesitos."*

*- Rosita, Waitress, 28 (Fieldwork, 2013).*

Second, firewood is sold at EcoAlberto by some of the social service staff; 11 out of the 28 social service staff interviewed (Fieldwork, 2013) at EcoAlberto reported to sell firewood to tourists without having to pay a commission to the company. Firewood bundles are sold at MX\$ 30 (US\$ 2) each. In 2013 firewood vendors calculated to sell between 30 and 50 bundles p/m, providing an income of approximately MX\$ 900 - MX\$ 1,500 (US\$ 69 - US\$ 115) to each vendor p/m. Therefore, firewood selling in 2013 produced a total direct revenue of at least MX\$ 9,900 - MX\$ 16,500 (US\$ 762 - US\$ 1,269).

### **Independent Artisans**

EcoAlberto promotes Hñahñu traditions and cultural elements. There is certain merchandise very distinctive of the region and the Hñahñu community. The parks have souvenirs and handicrafts to sell at two stores, where local artisans sell their products directly. In other words, EcoAlberto does not buy the product from the artisan, instead the company allows them to have a space to sell their products without getting any commission for it. These products are made out of maguey derivatives, like *ixtle* (maguey fibre). The prices can vary between MX\$ 10 to MX\$

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<sup>30</sup> It is assumed that these tip rates are due to tipping and etiquette manners in different countries.

500 (US\$ 80 to US\$ 38) depending on the product: handknit crafts e.g. bags, shirts and key chains; and consumable products like shampoos, soaps and exfoliating creams made from *aloe vera* and other species that grow locally.

The price in which handicrafts are sold at the parks is the exact price that artisans receive. Therefore, their revenues depend on the amount of handicrafts sold per day or week. In findings from interviews and questionnaires artisans or/and crafters reported to earn approximately MX\$ 2,000 (US\$ 154) p/m, however, these number cannot be completely attributed to ecotourism since the respondents also revealed to have alternative sources of income (e.g. selling traditional food or other snacks at local and regional markets) (Fieldwork, 2014).

*“We come to EcoAlberto to sell our handicrafts, they don’t charge us, and we have to take turns with other artisans during the holidays. I don’t have time to stay here (at EcoAlberto’s store) all day, I have other jobs to do... sometimes I sell a lot during holidays, but other times I get nothing for my work: ten, twenty pesos (US\$ 1.50 - US\$ 2), for something it took me hours to make, but I really need the money, so I sell it very cheap.”*

- Artemisa, 43, Artisan (Fieldwork, 2014)

As enlightened in the quote above, artisans also sell their crafts at El Alberto, Ixmiquilpan and other small cities nearby. Yet, due to the low-end markets, artisanal products are prone to be sold at cheaper prices. Results from the fieldwork (2013, 2014) also showed that independent artisans are among the lowest paid people in the region, and many of them have multiple jobs.

### **Local market: Convenience stores, and stall and street vendors**

Local convenience stores, and stall and street vendors at El Alberto are independent micro businesses owned by unskilled Hñahñu members. These businesses sell drinks, snacks, and other products in a price range of MX\$ 8 (US\$ 60) for a gum, to MX\$ 500 (US\$ 38) for artisanal souvenirs. During weekends and holidays stall and street vendors are located at the park’s entrance and along the roads, while during the week or low season they move around the local and regional market, and the roads that go to Ixmiquilpan and Mexico City.



*"During the week I don't sell anything at El Alberto, I have to go to Ixmiquilpan to make a few pesos... I like it when tourists come on the weekends or during holidays; I go on the roads leading to EcoAlberto's parks or at the entrance, they buy many things specially snacks."*

*-Naycir, 25, Street vendor (Fieldwork, 2014)*

Moreover, three out of four owners of convenience stores agreed ecotourism contributes a little during high season; they estimated to sell MX\$ 250 - MX\$ 350 (US\$ 19 - US \$27) more per day during the weekends and holidays. A difference from the other storeowner who reported that ecotourism has made no difference to his businesses, according to him 'tourists never visit the town'. On the other hand, all of the four stall sellers and three street vendors interviewed agreed that their income increases due to ecotourism especially during holidays, these vendors calculated to sell between MX\$ 600 - MX\$ 800 (US\$ 46 - US\$ 62) more per day during weekends and holidays<sup>31</sup> (Fieldwork, 2014). Of course it is expected that stall and street vendors obtain more profits from the tourism activity than convenience stores, since they can go to the tourist, their mobility is their advantage, local stores cannot compete with that.

### **Local market: *Ya mounts' b'ehña* cooperative**

*Ya mounts' b'ehña* (Otomi<sup>32</sup> for united women) is an artisanal cooperative formed by 317 Hñahñu women (not only from El Alberto, but from various communities of the Mezquital Valley). This is a manufacturing company of artisanal crafts making products made from *ixtle* such as handknit bags, shirts, and keychains; body cleaning products as scrubby mitts and stuffed sponges; and consumable products like shampoos, soaps and exfoliating creams made from *aloe vera* and other species that grow locally.

Even though the cooperative does not supply to EcoAlberto, it benefits from the tourism attracted by the parks. Furthermore, some of the ecotourists interviewed (Fieldwork, 2014) stated that EcoAlberto's staff encourages them to visit the cooperative's shop located at El Alberto, so they can see how products are made, and to find a bigger variety of products.

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<sup>31</sup> These numbers are only an estimate of the product sold, these are not the revenues.

<sup>32</sup> Dialect spoken by Hñahñu people of the Mezquital Valley in Hidalgo, Mexico.

*“Before I came, I did a bit of research and I came across products made from the cactus plants, but when I was at EcoAlberto I was very disappointed with the products I saw, I think one of the members of the staff saw my face and came to ask me if I was looking for something in particular, and she recommended me to go look for the women's cooperative at El Alberto, and I did, and I got what I wanted.”*

*-Sarah, 33, UK Ecotourist (Fieldwork, 2014).*

The cooperative did not hold records of the number of products purchased by tourists, yet, members of *Ya mounts' b'ehña's* committee, seem to think that the numbers have increased in the last few years. However, the cooperative's principal source of income comes from exporting the artisanal handicrafts and products to international retailers. The most popular products are scrubby mitts and stuffed sponges, both items are sold for MX\$ 40 (US\$ 3) at the local store and retailers pay US\$ 2.18 per piece, however, women members of the cooperative earn only MX\$16 (US\$ 1.20) per piece. The committee of the cooperative argues that the remaining revenues are invested in operating costs.

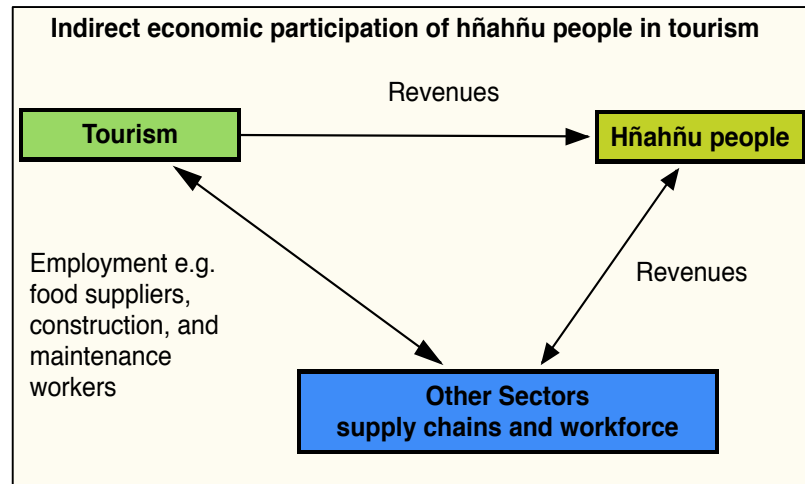
*“At times I have to handknit about 40 to 50 pieces of ixtle per week, and my husband helps me sometimes, and other times, I only have time to handknit 20, but we always have to make sure that we have enough pieces to sell to tourists, because lately, the tourist come not only to buy crafts, they want to see, how the crafts are made.”*

*- Amada, 55, Ya mounts' b'ehña's cooperative (Fieldwork, 2013).*

As stated in the quote above, it is not possible to estimate an average of the revenues that the cooperative members earn; since it depends on how many pieces they handle per week or month. Furthermore, some of the members have other jobs, and just make about 10 pieces p/w, while others make as many as 60 with the help of their children and husbands that have returned from the US.

Figure 59 shows how money that tourists spend at EcoAlberto turns into indirect revenues for the supply and construction sectors of the local community.

**Figure 59. Indirect Economic Participation of Hñahñu People in Tourism**

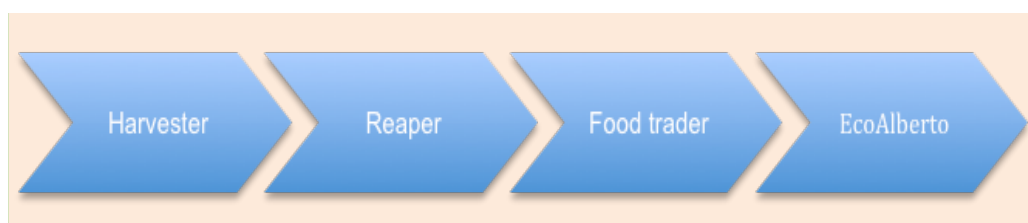


Source: author's elaboration based on fieldwork (2013, 2014)

Indirect participants are Hñahñu suppliers of EcoAlberto who do not interact with tourists; instead they earn revenues by providing specific goods or services to the ecotourism company. Indirect participants at El Alberto work mainly on supply sectors for example harvesters, reapers, food and meat traders; and within the construction industry, such as construction and maintenance specialists e.g. builders, carpenters and plumbers.

EcoAlberto as any other tourism venture requires various suppliers to meet visitors' demands. Its food supply chain is obtained (mainly) from Hñahñu micro businesses that grow, collect or make products locally (see figure below). Earlier analysed in this section, it is understood that EcoAlberto's food suppliers, are not exclusive to the ecotourism company, instead these micro businesses are independent providers from El Alberto's local market and they happen to sell their products to EcoAlberto.

**Figure 60. Supply Chain at El Alberto**



Source: author's elaboration based on fieldwork (2013, 2014)

For instance, meals purchased at EcoAlberto's restaurants are made with food supplies mostly produced by independent food traders from the local community. According to data collected during fieldwork (2013), the kitchen staff is in charge to select the food supplies needed for the restaurants e.g. vegetables, fruits, exotic food, etc. (see table 18); and to buy supplies directly.

Table 18. Products Supplied by Hñahñü People

Staple food traders	Meat traders	Exotic food
Corn	Chicken (derivatives)	<i>Escamoles</i> (larvae of ants)
Beans	Cow (derivatives)	<i>Xicoyotes</i> (a type of iguana)
Tomatoes	Pork (derivatives)	<i>Chiniquiles</i> (maguey worms)
Zucchini and its flower		<i>Quelites</i> (wild greens)
Onions		Skunk
Maguey and its flower		Grasshoppers
Pomegranate		<i>Tlacuache</i> (Opossum)

Source: author's elaboration based on data obtained during fieldwork (2013, 2014)

Additionally, the kitchen staff recognised the lack of records on this subject. Cooks argue not to know exactly when or what products they purchase on a daily or weekly basis, in addition, they also stated not to have steady suppliers, instead they purchased the products at the local market whenever needed, no strings attached.

*"Well, I don't know how much I spend... don't write it down, I just take the money from the drawer of the restaurant... Sometimes I spend 500 pesos, sometimes about 700 hundred, every time I go to the market, really, I don't know... I usually go to the market when I need something, that depends on what the tourists want, sometime I go to buy beans just once a week, sometimes four; other times tourists want Chiniquiles and I buy a lot of them, but then other tourists don't like worms, and I don't get them in for months. It's difficult to have everything always, because food goes bad quickly... and because of that we don't have a set supplier it would be difficult, besides I like going to the market and pick the products myself, I want to get the best quality, sometimes I send Karen, but she knows well, what to get too."*

- Juana, 50, Cook (Fieldwork, 2013)

Therefore, it was not possible to calculate the economic benefits that ecotourism brought to local suppliers that participated on the food supply chain with the data obtained from interviews and questionnaires in 2013 and 2014. The researcher could only estimate the income of staple food traders at local markets in those years. Moreover, as these traders are not continuous suppliers of EcoAlberto, the following numbers cannot be fully attributed to the ecotourism activity, yet, it is assumed that ecotourism has contributed with a small part of it. Reapers and harvesters are the less remunerated among the food supply chain, they earn in average MX\$ 150 (US\$12) per day of labour (p/dl); food traders make approximately MX\$ 250 - 350 (US\$ 19 - US\$ 27), and meat traders an estimate of MX\$ 500 (US\$ 38) per day of labour.<sup>33</sup>

Table 19. Food Suppliers and Construction Workers in 2013

Food Supplier	Per day of labour
Harvesters	MX\$ 150 - US\$ 12
Reapers	MX\$ 150 - US\$ 12
Food traders	MX\$ 250 -350 - US\$ 19 -27
Meat traders	MX\$ 500 - US\$ 38

Type of worker	Per day of labour
Carpenter	MX\$ 200 - US\$ 15
Plumber	MX\$ 200 - US\$ 15
Maintenance	MX\$ 150 - US\$ 12

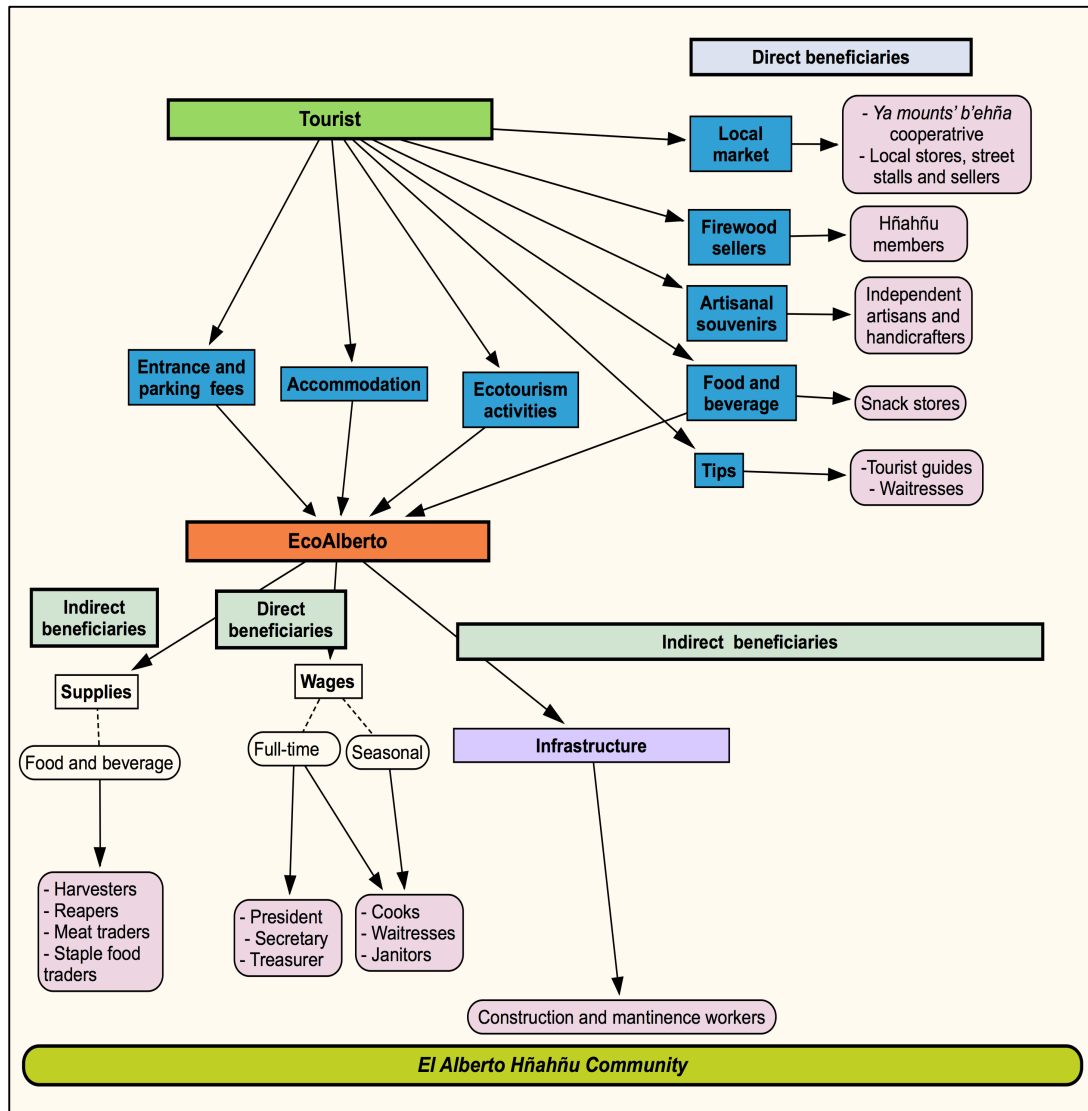
Source: authors' elaboration based on fieldwork (2013, 2014)

On the other hand, the construction sector has an income when there are development projects at EcoAlberto or the local community, meaning that these are also not steady workers. For instance, there are new plans to build another cabin at the Grand Canyon and a bigger swimming pool at the water park, while these projects are on construction only a few people of the workforce will be paid – such as carpenters, plumbers, maintenance workers (see table 19), given that the rest will work under the communal system<sup>34</sup> (a.k.a cargo system), which includes personnel from EcoAlberto and other people from the community as necessary.

<sup>33</sup> Is important to state that the estimated numbers cannot be attributed to the ecotourism activity only, as well as to notice that these numbers are only an estimated of the product sold, these are not the revenues.

<sup>34</sup> Working under the communal system, means that they will not be paid, the Hñahñu members of the community have to do work for the community as a duty.

Figure 61. Map of the Tourism Expenditure at El Alberto: Hñahñu Economic Participation



Source: author's elaboration based on data obtained during fieldwork (2013, 2014)

Figure 61 builds on the direct economic participation (see figure 59) by incorporating food suppliers and the workforce needed for infrastructure at the EcoAlberto and its local community. Even though, both are indirect beneficiaries, tourists and ecotourists' expenditure reaches them when spending money at EcoAlberto. The arrows directed from the green box on top (tourist) of the boxes in blue, displays the tourist expenditure on these nodes or activities that at the same time are part of EcoAlberto.

## Step VI. Map of the Ecotourism Revenue Stream

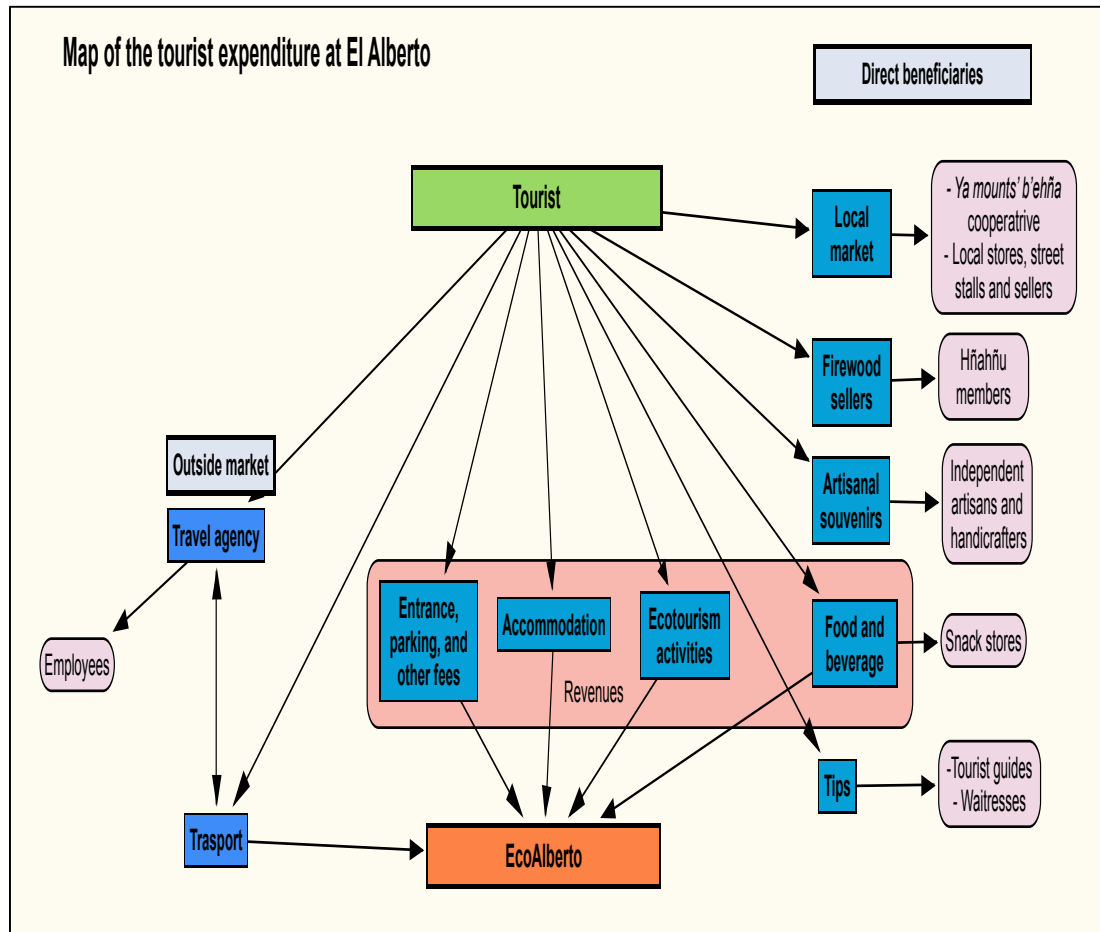
The previous section has already marked the way to follow the revenue stream. Identifying where Hñahñu people participate and obtain incomes for their households, however, this section finds out where the rest of the tourist expenditure is concentrated.

One of the objectives of the present investigation is to estimate the share of revenues from visitors that stays at local community, reaching Hñahñu people. This part covers spending at convenience stores and stands owned, staffed and supplied by locals; purchasing handicrafts made by Hñahñu artisans; and spending out of pocket expenses on items produced and sold by local street vendors. Tourists that visit EcoAlberto spend money that impacts the local economy, directly and indirectly moreover, beyond the benefits of these payments, there are other sectors that benefit from the visitors' expenditure, which constitutes also a direct impact on the economy of El Alberto (see figure 62).

Furthermore, tourism expenditure at the parks which is not included on EcoAlberto's revenues, are: (1) artisans and handi-crafters which sell their products at EcoAlberto's stores; (2) Hñahñu people who run and provide supplies for snack stores at EcoAlberto; and (3) waitresses and tourist guides who may receive tips for their services. These are direct beneficiaries of the tourism expenditure.

Figure 62 (below), marks the division between tourism expenditure that contributes to revenues at EcoAlberto, we already know that tourists spend money on the blue boxes, however, it is also clearly shown that from the five blue boxes on the right only one has an arrow reaching for EcoAlberto, the meaning of this is that the node 'food and beverages' has a double relationship with tourism, there are the providers of the snack stores who earn their income directly from the tourists and there are the kitchen employees and food suppliers who earn an income through EcoAlberto. Moreover, none of the other four represent any earnings to EcoAlberto. On the other hand, arrows pointing at EcoAlberto mean that these activities or services do contribute to EcoAlberto's revenue.

Figure 62. Map of the Tourist Expenditure at EcoAlberto



Source: author's elaboration based on data obtained during fieldwork (2013, 2014)

## 6.1 Transport

EcoAlberto offers shuttle services that runs only from Ixmiquilpan - EcoAlberto and return. The service charges MX\$ 10 (US\$ 8) return trip per person. However, EcoAlberto's staff and employees have recognised that this service is hardly used, given that tourists normally arrive in their own vehicles.

## 6.2 Accommodation

The rent of 12 cabins and plenty of tents are available for 2, 4 and 6 people, for the cabins the prices start at MX\$1,400 (US\$ 108) for two people and goes up approximately in or rent of the camping area US\$ 1.68.



### **6.3 Food and beverage**

Food and beverage products purchased at the EcoAlberto's restaurants, are principally main meals and snacks. Breakfast, lunch and supper cost approximately MX\$ 50 (US\$4.) 2 and dinner for MX\$ 45 (US\$ 4).

### **6.4 Ecotourism activities**

Ecotourism activities are the main source of revenues of EcoAlberto along with the entrance fees. The night walk and the show of torches are priced MX\$ 250 (US\$ 19) per person, the show requires a minimum of 25 participants, to carry on; every time the show is performed there is a minimum revenue of MX\$ 6,250 (US\$ 841). According to interviews with managers and staff (Fieldwork, 2013; 2014), the night walk is performed at least twice a month during a year, generating a minimum income of MX\$ 150,000 (US\$ 11,540) per year. Although there are no approximate numbers of the economic contribution the rest of the ecotourism activities per se is estimated that all ecotourism activities contributed their main generator of income.

### **6.5 Entrance and other Fees**

Entrance fees to the water park and ecologic park was US\$ 4 and US\$ 1.50 respectively (until 2014), as mentioned above, entrance fees are among the main source of revenues of EcoAlberto. During the years the number of visitors have increase, as a result the income generated by the entrance fees has also increased. Table 19 illustrates an estimate how the number of visitors has increased during the years, and so have the entrance fees. According to a CDI (2014) report, in 2009 EcoAlberto had about 8,400 visitors, without stating whether these tourists visited the ecologic or water park<sup>35</sup>; 70,000 visitors in 2010 (Garcia and Tovar, 2012); 50,000 in 2012 and in 75,000 in 2013 (Fieldwork 2013; 2014). On the other hand, there was no record available of revenues generated by other fees such as parking MX\$ 30 (US\$ 2.31), rent of tables MX\$ 15 (US\$ 1.12), and rent of chairs MX\$ 7 (US\$ 0.56).

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<sup>35</sup> The water park and ecologic park have different entrance fees, therefore, the estimated number of revenues is broader without that data.

**Table 19. EcoAlberto's Visitors 2009 - 2013**

Year	Visitors	Income	Entrance fees	Total income
2009	8, 900	n/d	MX\$ 163,800 – 436,800 US\$ 12, 600 – 33, 600	MX\$ 130,000 US\$ 86, 988
2010	70, 000	n/d	MX\$ 3,640,000 US\$ 280, 000	n/d
2011	n/d	n/d	n/d	n/d
2012	50, 000	n/d	MX\$ 975,000 - 2,600,000 US\$ 75, 000 – 200, 000	n/d
2013	75, 000	n/d	MX\$ 1,456,000 – 3,900,000 US\$ 112, 000 – 300, 000	n/d

Source: Garcia and Tovar, 2012; CDI report, 2014, Fieldwork, 2013, 2014

Rate: US\$ 1 = MX\$ 13  
(average during 2012-2013)  
n/d: no data available

## 6.6 Other Direct and Indirect Flows

A part from the activities and services stated above there are services as provided from outside El Alberto, Travel agencies also involved (as seen in previous sections of this study). There are different scenarios for the tourism process where tourist expenditure varies depending on the scenario. Thus, it has also been discussed, that the money tourists spend to get to EcoAlberto through a travel agency may depend on the number of tourists visiting, due that these agencies only provide travel services, furthermore the travel companies are located in cities such as Ixmiquilpan, Mexico City and Pachuca, and their employees are people from other cities, therefore, the income of the travel agencies remains in the outside market. On the other hand, if tourists require transport from the city of Ixmiquilpan to EcoAlberto, the company's transport charges MX\$ 50 (US\$ .30) one way per person, however, there is no record of how many people has require this service.

## Step VII. Map of the Distribution of Benefits and Impacts

Every part of EcoAlberto's sources of income are generated by the tourism process e.g. activities, services and products; that have assisted in the consolidation of ecotourism as one of the main economic activities of El Alberto. Hence, beyond the revenues that Hñahñu people receive from the tourism value chain, El Alberto and all its members, even those who do not receive a single *peso* from the ecotourism activity obtain an ultimate benefit, when EcoAlberto distributes its revenues. Thus, even though EcoAlberto is considered to be a community-based ecotourism venture, a difference from those is that El Alberto's ecotourism company does not distribute its revenues in equal shares among the community members. Instead, revenues are invested in social projects that benefit the local community as a whole.

Therefore, as calculated on the table 20, EcoAlberto distributes its revenues in two main areas as follows: (1) operating costs (including costs of reinvestment in the company), and (2) social projects (within the local community).

Table 20. Distribution of EcoAlberto's Revenues

<b>EcoAlberto</b>	<b>%</b>
<b>Operating costs</b>	<b>60%</b>
<b>Reinvestment in the company</b>	
<b>Social projects at El Alberto</b>	<b>40%</b>
Infrastructure	30%
Education	5%
Other projects	5%
<b>Savings</b>	<b>----</b>

Source: author's elaboration based on fieldwork (2013, 2014)

## **7.1 Operating Costs**

EcoAlberto has designated about sixty percent of the monthly income to cover operating costs; these include activities, services, products and even people to ensure that the ecotourism company operates steadily on a daily basis. Furthermore, also under the umbrella of operating costs are those services, activities and products required to be reinvested in the ecotourism company.

Findings obtained from interviews with EcoAlberto's managers showed four sectors among the EcoAlberto's tourism value chain, which represent the main operating costs for the company in years 2012 and 2013 (see table 21).

### **(1) Wages**

In 2012 and 2013, the total of wages paid to employees remained one of the highest operating costs of EcoAlberto, despite that the company only pays 7 to 10 employees, these wages per month were estimated to be between MX\$43,000 (US\$ 3,308) in low season, and up to MX\$ 61,000 (US\$ 4,336 in high season), depending on tourist arrivals. In addition, it is calculated that around US\$ 446 was used by the EcoAlberto's president in both years to cover the expenses of his business trips.

### **(2) Cleaning and other supplies**

The purchase of cleaning supplies for both parks were calculated to be between US\$ 1,115 to US\$ 1,259 in 2012, and incremented to US\$ 1,250 to US\$ 1,350 per month in 2013; these supplies include the chlorine used for the swimming pools.

### **(3) Services**

Bills of MX\$ 18,000 (US\$ 1,385) were estimated to be paid every month for basic services such as electricity, water, telephone, et cetera, in 2012. Though in 2013 these bills were estimated to increase to MX\$ 20,000 (US\$ 1,538).

### **(4) Catering**

Food supplies were also perceived amid the highest expenses of the company, for instance, in 2012 as well as in 2013, approximately MX\$ 11,00 (US\$ 846) was spent on a monthly basis to feed local people performing *faenas* as a community service. However, there was no record available (at the time of the fieldwork 2013, 2014)

that could assist to create an estimated number of the money spent in food supplies a result of nonexistence data due to the approach used by the kitchen personnel to purchase food supplies. Although, there was no record of money spent on food supplies, participants of the interviews (managers, cooks, and waitresses) reckoned that the majority of food supplies are normally purchased from different food providers at the local market, thus, in the end, the benefits go to the local community (see figure 63).

**Table 21 Operating Costs found within EcoAlberto's TVC in 2012 and 2013**

Operating Costs	US\$ P/M 2012	US\$ P/M 2013
Total employee wages in low season	up to MX\$ 43,000 US\$ 3,308	up to MX\$ 43,000 – US\$ 3,308
Total employee wages in high season	up to MX\$ 61,000 US\$4,692	up to MX\$ 61,000 – US\$4,692
President's travel expenses	MX\$ 8,000 – US\$ 615	MX\$ 8,000 – US\$ 615
Food supplies for the restaurant	n/d	n/d
Food supplies to feed hard working people (i.e. during <i>faenas</i> )	MX\$ 11,000 - US\$ 846	MX\$ 11,000 - US\$ 846
Services (electricity, water, tel.)	MX\$ 18,000 - US\$ 1,385	MX\$ 20,000 - US\$ 1,538
Maintenance of the equipment (tractors, lawnmowers, etc.)	MX\$ 3,000 - US\$ 231	MX\$ 3,000 - US\$ 231
Chlorine and other cleaning supplies (e.g. toiletries)	MX\$ 18,000 - US\$ 1,385	MX\$ 20,000 - US\$ 1,538
Petrol	MX\$ 10,000 - US\$ 769	MX\$ 12,000 - US\$ 923
Taxes	n/d	n/d
Pesticide control	MX\$ 4,800 - US\$ 369	MX\$ 5,000 - US\$ 385

Source: author's elaboration based on data obtained during fieldwork (2013, 2014)

Rate: US\$ 1 = MX\$ 13  
(average during 2012-2013)  
P/M; per month  
n/d: no data available

Other operating costs as seen in table 21 are, maintenance of the equipment such as tractors and lawnmowers, petrol, taxes and pesticide control.

### 7.1.1 Reinvestment in the Company

On the other hand, it is not clear what amount of the sixty percent granted for operating costs is employed in the reinvestment of EcoAlberto. A difference from operating costs, activities, services and products employed for the reinvestment of the company are not purchased on a monthly basis.

*“Putting money back into the parks is the best way in which we can assist the company to grow and to generate more revenues, then it can be invested in more local projects. People from the community sometimes wonder if we keep the money, but we put it all into EcoAlberto. It may not seem to them that EcoAlberto is growing, believe me, it is growing.”*

*- Felix, 44, Hñahñu Chief (Fieldwork, 2013)*

Therefore, according to Felix and Adolfo (Fieldwork, 2013) and other staff from EcoAlberto (Fieldwork, 2013, 2014), reinvesting capital into the company, is allegedly not only a good strategy to grow the company's demand, but also to build wealth. Moreover, EcoAlberto has the advantage of not having to pay wages to 90% of its labourers (due to community service). Ergo, EcoAlberto's managers have the flexibility to reinvest in a company that is growing at a good pace, but has room for improvement. Figure 63 recognises EcoAlberto's reinvestment strategies are the following:

- (1) The acquisition and/or maintenance of equipment such as boats, kayaks, wires, ropes, hooks, helmets, gloves, and other equipment required to perform ecotourism activities safety.
- (2) Advertisement and publicity: even though, EcoAlberto does not seem to have a solid marketing plan for the advertisement of its products and services, according to the company's managers, and observed by the research team, there is a fair amount of EcoAlberto's advertisement regionally, for instance articles and pictures in regional newspapers e.g. *El Universal* in the State of Mexico, *El Sol de Hidalgo* in Pachuca, and *Huracan* in Ixmiquilpan; in regional magazines: *Enterate* in Tula de Allende and

*Cactus* in Ixmiquilpan; as well as posters and people handing out flyers in Mexico City's underground, and along nearby roads such as El Alberto-Ixmiquilpan, Ixmiquilpan-Pachuca and Ixmiquilpan-Mexico City. Furthermore, from time to time a team from EcoAlberto presents their services in strategic touristic stands at the aforementioned cities, in national tourism exhibitions, and indigenous festivals.

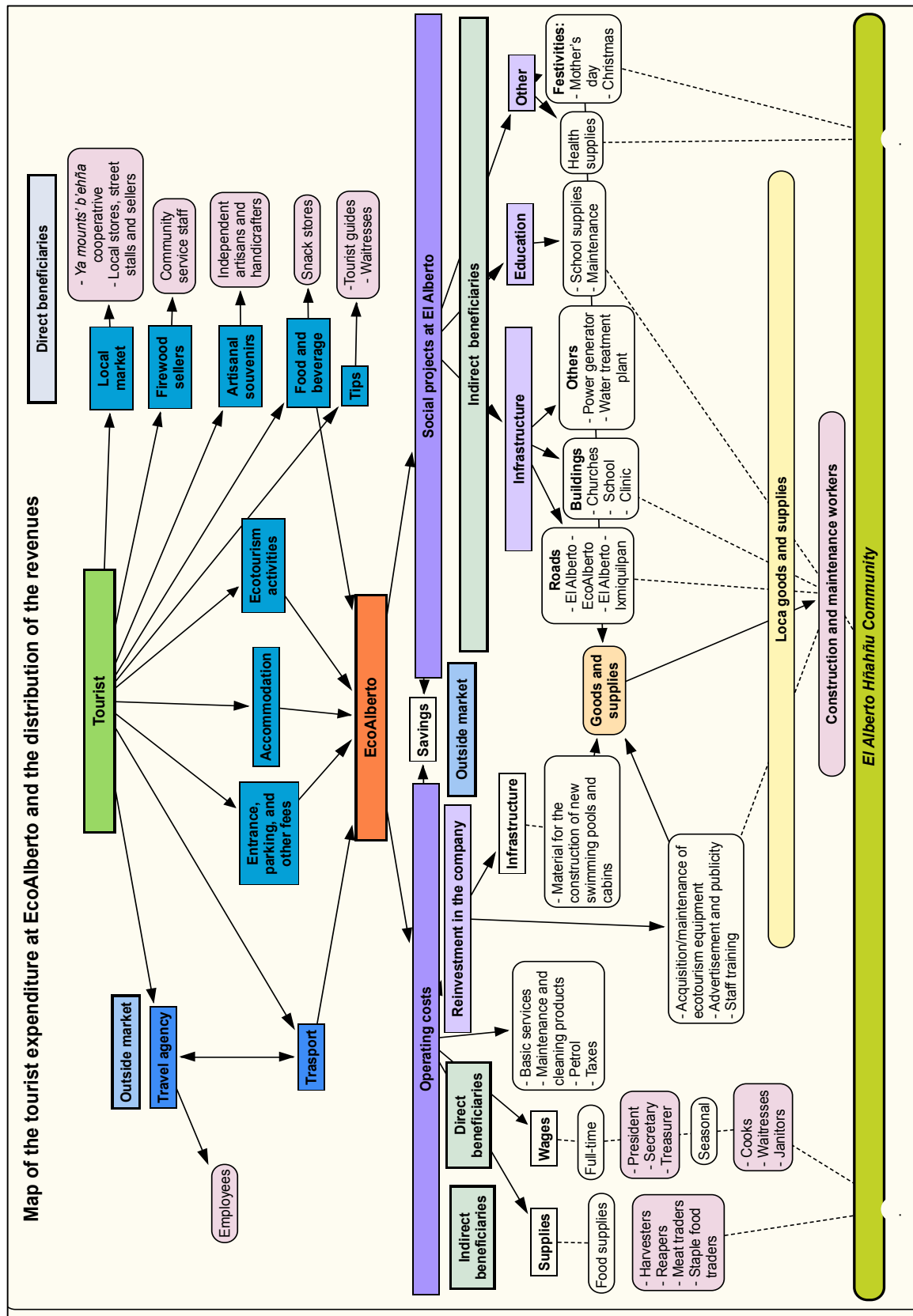
- (3) Dividends spent on staff training (e.g. guides and administration) are considered to be part of both, operating costs and reinvestment in the company.
- (4) Capital for the development of new infrastructure (e.g. cabins and swimming pools), and to purchase material for construction and pay wages to specific workers<sup>37</sup>. Nonetheless, it is complicated to estimate how much capital EcoAlberto has invested in infrastructure, given that the National Commission for the Development of Indigenous Villages (CDI) has financed most of EcoAlberto's infrastructure (e.g. cabins, swimming pools, toilets and dressers) and the regional government has covered the costs of new roads.

Figure 63 incorporates earlier maps of the tourist expenditure at El Alberto (indirect and direct benefits for Hñahñu people), and at the ecotourism company. It also portrays EcoAlberto's distributional flows of revenues directed to operating costs and social projects.

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<sup>37</sup> Un-skilled and semi-skilled workers that are not part of the community service at EcoAlberto e.g. builders, carpenters, plumbers, and maintenance workers.

Figure 63. Map of the tourism Expenditure at EcoAlberto and the distribution of the Revenues





## 7.2 Social Projects at El Alberto (Financial Benefits)

Forty percent of EcoAlberto's capital is employed at El Alberto with the aim to ameliorate the livelihoods of its Hñahñu people and to create social changes with the development of projects that can benefit the local community entirely. Therefore, social projects are divided into three main segments: infrastructure, education, and other projects and festivities.

- (1) Thirty percent of the company's capital is employed in the infrastructural development of El Alberto. As seen in figure 73, part of these revenues are invested in the construction and maintenance of roads<sup>38</sup>, small buildings and community properties (e.g. churches, schools and clinics); to buy construction supplies such as cement and wood; and to pay for construction workers. Furthermore, a part of this percentage is used to cover basic services of the local community, thus, the local members of the community do not have to pay for these services (e.g. electricity, and water). This became clear while the researchers were carrying out fieldwork in 2013; inhabitants of El Alberto reported on interviews that a power generator broke a few weeks before the data was gathered, thus, most participants reported that EcoAlberto covered the costs of a new power generator.

*"...the power generator broke a few weeks ago, and EcoAlberto paid for it; before the development of EcoAlberto we (community members) had to chip in every time the community needed something done, or to repair something, and imagine 500 pesos (US\$ 38) per person it's a lot of money, there are five adults in my house that would of been 2,500 pesos (US\$ 192), it is good to have the revenues from the parks."*

*- Gloria, 31, Stall seller (Fieldwork, 2013)*

Furthermore, governmental organisations built a water treatment plant and EcoAlberto gives it maintenance.

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<sup>38</sup> The roads El Alberto-EcoAlberto and El Alberto-Ixmiquilpan were built with the government's funds on EcoAlberto's administration request, to make it more accessible for tourists to visit the parks.

- (2) Education is another important segment among social projects at El Alberto; in the distribution of benefits, education obtains five percent of EcoAlberto's revenues. That capital has been employed (with the assistance of the local government), in the construction and maintenance of local schools (e.g. kinder garden and elementary school). As a result, more children have attended school since then, as they do not have to travel to Ixmiquilpan and return every day. In addition, part of this five percent is also used to purchase school's supplies needed for the classrooms.
- (3) Other social projects are operations, supplies or costs that are important for the locals, but have not been included in any of the previous categories e.g. health supplies for the clinic, medicines, bandages, et cetera; and festivities, traditions that are crucial in the social lives of the Hñahñu people. In consequence, EcoAlberto assigns five percent of its income to other social projects and festivities. One example is mother's day, every year there is a festivity to commemorate Hñahñu mothers at El Alberto, who also receive some of the groceries listed on the national basic food basket<sup>39</sup>. Another example is a small Christmas dinner provided by EcoAlberto to all the Hñahñu members of the community.

*"This year, we (EcoAlberto) gave about two hundred and something bags with essential groceries to each mother that attended mother's day festival."*

*- Maria, 18, Receptionist (Fieldwork, 2013).*

*"...also during winter, we (EcoAlberto) provide a small meal for all Hñahñu members; this past year we gave food to 1,500 to 1,800 people approximately."*

*- Arturo, 26, Hñahñu Chief (Fieldwork, 2013).*

Furthermore, capital that is not spent on operating costs nor on social projects goes into EcoAlberto's savings (see figure 63), a fund created in case of emergencies and other needs that the community may have. El Alberto began to have savings and emergency funds, after the development of ecotourism.

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<sup>39</sup> Set of essential goods to meet their needs according to their income. Some of the goods are milk, eggs, sugar, tortillas, cheese, corn, beans, oil, milk, bread, etc. (Coeval, 2015).

### 7.3 Non-Financial Benefits of Ecotourism

Before the incorporation of ecotourism there was no social organisation among the community, when the members of El Alberto initiated the idea, putting their plan into action, they started a community collective or cargo system to empowered the community as a whole and encourage everybody to get involve in the project. This reinforced their values, and assisted in the revival of their culture and traditions that were rapidly losing since the Hñahñu people started to migrate to the U.S. Moreover, ecotourism has helped to improved Hñahñu peoples pride and self-esteem as a consequence of tourists interested in their unique traditions and culture, visiting the land that belongs to them it is a sign of respect that the 'outside world' has acknowledged the existence of their unique environmental culture, and traditional. With the incorporation of ecotourism and the development of the ecologic parks practically on they own, has make them feel proud of their culture; it has even helped them to recover their almost-lost cultural roots and traditions. For instance, now more Hñahñu people use their traditional costumes when tourist come to visit, they wear them with pride, not too long ago, many were ashamed of those dresses.

The incorporation of EcoAlberto as water and ecologic parks, opened the door for the development of other local business, for instance it created opportunities to empower women with projects such as *Agua EcoAlberto* and the women cooperative *Ya mounts' b'ehña cooperative* and other women groups have developed their own artisanal products made of local plants and cactuses to sell to tourists.

The rate of Hñahñus migrating to the U.S. has reduced considerable due, to the one-year community service that they have to fulfil at EcoAlbeto and also to more local economic opportunities. Subsequently the development of EcoAlberto and local business, and the return of people form the U.S. as resulted in the young attending high school, technician courses, and others even attend university in the nearby city of Ixmiquilpan.

## **Step VIII. Identify Strengths, Constrains and Viable Solutions to Overcome Them**

Findings of the TVC mapping have been indicated in the seven previous steps, it clarifies the strengths and weaknesses of the projects, and then it moves to analyse the constraints and limitations and offers viable recommendation on how it is possible to overcome them. The foremost strengths and also weaknesses of the management and training of project personnel uncovered in the research are documented below.

### **8.1 Strengths of the EcoAlberto Ecotourism Projects**

#### **8.1.1 Community Participation**

The majority of the indigenous community members at El Alberto are deeply committed to their work. Allegedly, about 90% of EcoAlberto's personnel works full time during the year without any payment, as a type of social service to the community, which all the Hñuhñu members (over 18 years-old) do at least once every ten years to keep their status as members of the community. According to the tourism value chain analysis, this community service is what makes possible for EcoAlberto to stay in business even if they do not have many visitors for a certain period of time. In addition, the development of EcoAlberto as well as the creation of the year of community service were both strategies to stop Hñahñu members from immigrating to the US and for those who were in the US to able to return to El Alberto and work at home. Nevertheless, not all the Hñahñu people welcomed the idea, having to work for a year without payment, is not an easy decision. If the immigrants from El Alberto decided to stay in there US and not perform the year of community service, they would be excluded from the Hñahñu community. Thus, many migrants decided to go back and forth to secure their place at the community and to have enough money for the well-being of their families. Although most of the people are not certain about the idea, as nobody (in great need of money) likes to work without salary for a year. Yet, the community as a whole greatly benefits from the scheme, as the inhabitants live in greater transparency, accountability and harmony, and are fully active and informed about the affairs of the ecotourism company.

### **8.1.2 Resourceful Personnel**

Even though all of indigenous tourism personnel had not been elaborately trained in commercially prepared qualities such as customer service and hospitality, their own self-perceptions and ability to draw upon cultural and other traditions of hospitality, kindness to guests and earnest care for visitors, appears to assist them in offering culturally appropriate customer service and hospitality to enhance the visitors' ecotourism experience. Other resources such as cooking or the elaboration of artisanal products are also founded upon skills that the indigenous people have practiced, passed on through generations among the community members. For instance, the women from the community use their skills to make artisanal crafts and traditional food. Certainly, the Hñahñu women are residents have expressed that having a market for their artisanal crafts is the one of the best parts of the introduction of ecotourism into their community. Correspondingly, the men of the indigenous community have used their traditional and often internationally-enhanced skills to work in and manage the construction and farming. While many tasks remain to a certain extent gender-disaggregated in accordance with traditional roles, many of those interviewed also drew certain comfort and traditional security from these differentiations. Furthermore, the development of tourism generates a need for education as well as jobs within the tourism industry. Most of the indigenous people in the community now speak Spanish, in addition to their native language, due to their commitment to the ecotourism venture.

### 8.1.3 Minor Environmental Impacts

The present case studies carry very few environmental impacts among their well-developed ecotourism's projects on their land. The Hñahñu communities located in the region of the Mezquital Valley in the state of Hidalgo in Mexico, have constantly proclaimed that their ancestral roots come from the *Otomi* people, from whom they have inherited the vocation to conserve the natural resources of their land, especially water and the forest. The development of EcoAlberto's parks on the Hñahñu collective land has encouraged them even further to safeguard the natural resources, as it is the prime motivation for the visits to the ecologic parks. Therefore, the region of the Mezquital Valley that holds the ecotourism projects' infrastructure has not suffered few negative impacts due to (1) there is little infrastructure, and (2) this infrastructure has been built with native material and resources *ad hoc* with the natural surroundings lessening the impact on the environment - with the exception of the plastic toboggans used to slide down in a couple of swimming pools from the water park. It is true that some residents must do community service for a year (i.e. work, but no income) at the ecologic parks creating some short-term economic loss, and many of the members doing community service also sell firewood, but given that the tinder comes from the dead branches of the trees, it could be argued, that this does not bring environmental implications around the forests. Ecotourism is sustainable tourism, and in high seasons such as spring and summer, the number of tourists that arrive at EcoAlberto's parks are controlled by the locals; a committee is in charged to patrol the different areas to prevent the sensitive environment from being damaged by some tourists' reckless behaviour. The committee raises environmental awareness to visitors through guides and other tourism providers, who communicate to the visitors the importance of a healthy environment, and the significance of contributing towards the preservation and conservation of the flora and fauna.

#### **8.1.4 Empowerment of the Hñahñu People**

The Hñahñu people of El Alberto as many indigenous peoples (from Mexico and around the world) were once vulnerable and marginalised. They live in rural areas, where they suffered of inequality, social exclusion and discrimination in various ways. Nevertheless, the development of EcoAlberto's parks enhanced the well-being of these indigenous peoples and lead to their economic, social, psychological and political empowerment, as well as the enhancement of indigenous pride and female participation.

##### **Economic Improvement**

The development of ecotourism with the integration of EcoAlberto's parks has produced different options to generate earnings; these earnings also produce a sustainable economic development by bringing in long lasting revenues for the local community. As reviewed in Step V of this chapter, it seems that a fair share of the ecotourism revenues remains at the local community, and those revenues produce cash flows that have enhanced the well-being of the local community, and aid to the reduction of poverty. For instance, part of these revenues are used (directly) for the construction of schools, clinics, road, and (indirectly) for housing, the creation of micro enterprises and employment. Furthermore, the improvement on the economy of El Alberto has also pushed the local community to towards other types of empowerment.

##### **Social Enhancement**

In the community of El Alberto, ecotourism has ameliorated and maintain a stability among the lives of the Hñahñu inhabitants. In other words, the development of ecotourism has aid towards the integration of all the inhabitants of the community and also to those members who live between El Alberto and the US, building a sense of social cohesion. Moreover, some examples of social enhancements that in which the development of ecotourism has contributed the most is by reducing constraints to education, issues regarding the inclusion of vulnerable groups such as women and youth in social activities; as a result, this has generated psychological empowerment and indigenous pride.

## Indigenous Pride

EcoAlberto's ecologic parks did not flourish from one day to another, it was a process through the years. Seeing this project building up day by day, against all odds, originated a sense pride and self-esteem among the Hñahñu members; they used the ecotourism projects to show their natural attractions as well as their distinctive culture and unique traditional knowledge. Indigenous pride refers to the psychological empowerment of indigenous peoples, as reviewed in Chapter II of the literature. Yet, this 'indigenous pride' was not born with the inception of EcoAlberto as an ecotourism project *per se*, but as the outside world (e.g. tourist, neighbouring communities, governmental institutions, etc.) started to recognise that it was the very Hñahñu people from El Alberto who came up with the ecotourism idea, and were able to run not one, but two ecologic parks in a sustainable manner. Thus, the Hñahñu inhabitants of El Alberto, not only feel proud and dignified of their culture, the appreciation of 'other' people in their 'native ways' has also motivated them to rescue their long lost traditions. For instance, the Hñahñu members of El Alberto encountered many types of social discrimination, especially for being part of an indigenous group and speak a different language, yet as witnessed by the investigator during the fieldwork, the Hñahñu are now very proud (indeed) of their native clothes, and to talk their traditional tongue *Otomi*, as well as to encourage the youth and children to learn it. Thus, El Alberto's ecotourism projects have served as a mechanism to secure the welfare for the Hñahñu community so far.

## Political Competence

The development of the EcoAlberto parks has provided the Hñahñu members of El Alberto to have a voice, and to use that voice to claim their indigenous lands and rights of accessing and using its resources in a sustainable manner. The Hñahñu people has also learned to communicate their concerns to obtain support, and act upon their resolutions, they have gained a number of skills, perspectives and values to deal with the government if there is a need to defend their indigenous rights. Perhaps, the clearest example of their political empowerment is the direct and indirect participation of the whole Hñahñu community in the inception and development of EcoAlberto's projects. Additionally, the development of ecotourism



has also empowered vulnerable groups of the local community, and even aid to empower vulnerable groups of other neighbouring communities (e.g. women artisans working at El Alberto's cooperative). Further, it has boosted the creation of various committees to represent the best interests of the Hñahñu people, and that has granted locals the right to participate (through community assemblies) in the decision-making regarding EcoAlberto's Parks, and to resolve community issues. Furthermore, ecotourism has also moved the Hñahñu community of El Alberto a step closer towards women equity.

### **Women Empowerment**

Men and women have different roles and responsibilities in the Hñahñu community of El Alberto, as reviewed earlier in this chapter Hñahñu women do not have the same rights, access and control over the collective land as men. However, with the international immigration of a very high percentage of Hñahñu men, and the implementation of ecotourism at El Alberto, the division of labour and rights over land started became more flexible for women. In addition to social and other types of empowerment that ecotourism has boosted for all Hñahñu people, ecotourism development at El Alberto brought special advantages for women. For instance, while the international immigration forced women fill-in regarding men's duties or the little work that was left at El Alberto (normally done by men), ecotourism stimulate women too propose interesting initiatives as *Agua EcoAlberto* and other business ideas. Perhaps, the most evident example of female empowerment (not only at El Alberto, but in the whole Mezquital Valley) is the case of Hñahñu artisans, the women's cooperative a.k.a. *Ya munts'i b'ehña*, these Hñahñu women formed a sustainable enterprise for the benefit of their families, and the region, given the demand artisanal products by tourist visiting EcoAlberto's parks. These type of business allowed them to create an income, while preserving on their culture and traditions. This group of approximately 300 women from El Alberto (and other neighbouring communities) from the Mezquital Valley. Additionally, to the production of handicrafts, the cooperative and the local government of Ixmiquilpan have work together to empower women by providing training on gender equality and other type of female issues, that they consider important. These trainings consist first in the empowerment and training of female leaders, who can organise, train and teach

educational workshops on different topics such as sexual and reproductive rights, indigenous women's rights, women and sustainability, women and economy, women and migration; among many others. Therefore, since the development of EcoAlbertos' parks women have progressively (but not totally) gain their rights to land and to participate in the community's decision-making process.

## **8.2 Main Constraints and Recommendations to Overcome Barriers to EcoAlberto's Tourism Value Chain**

EcoAlberto has valuable natural resources and a strong comparative advantage to the rest of the tourism developed around the region, including an innovative, indeed unique, attraction in The Night Walk, and an important story to tell about alternatives to illegal migration for sustainable local livelihoods. Based on the evidence showed by the TVCA, as presented in the previous 8 steps, the following key constraints were identified:

### **8.2.1 Limited and Expensive Accommodation**

The only two options to stay overnight at EcoAlberto is to rent a cabin or a tent. The cabins are environmentally friendly, yet as shown in the findings, the rate of visitor who have decided stayed there is low. The low occupation rates have much to do with the prices in which these are offered, ranging from pesos \$1,400 (US\$ 108), \$2,000 (US\$ 154) and \$2,700 (US\$ 208), very much higher prices for the type of tourist that was spotted and interviewed in the area. This analysis suggests that by lowering the prices, the park could attract more revenues from the accommodation sector. The tourist survey carried in 2014 showed that 52% would stay at the cabins if the prices were lower than US\$ 100; 8% responded the maximum amount of money that they would pay for accommodation at this cabins is \$US 50; 12% stated that they wanted to stay in the camping area and were not interested in the cabins; and 28% responded that they did not want to stay the night.

EcoAlberto may gain from lowering their rates in the cabins, to attract more visitors to stay the night and to generate more income.

### **8.2.2 High Costs of Amenities**

Basic amenities such as electricity are expensive in the remote rural location, a factor that may also contribute to the accommodation high rates. Because EcoAlberto is indeed situated in a rural location, which contribute to higher prices for electricity, findings suggest EcoAlberto might invest in off-grid green energies. The region where the parks are situated is surrounded of natural resources it can easily incorporate solar power, wind power or small-scale run-of-the-river hydropower. In addition, renewable energy source has a smaller impact on the environment, and the skills and knowledge that is required to maintain it could lead to both education and employment at a higher level in the community itself. While traveling back and forth to EcoAlberto, the researcher saw at least one tourism project with small wind small wind turbines. If EcoAlberto cannot afford to purchase such technologies, they may find that governmental organisations or NGOs, including UN programs, have mandates to offer grants or provide such equipment in exchange for rights to the carbon credits for the avoided emissions. There are many organisations in Mexico that may be able to cover at least part of the cost, such as the Ministry of Environmental and Natural Resources SEMARNAT, or even US non-governmental agencies, which seek to purchase emissions reductions credits in Mexico. Other challenges include low productivity and need for training, ineffective distribution networks, and ineffective international market access, in terms of attracting international tourism in greater numbers.

### **8.2.3 Limited Business and Management Skills**

A major constraint in the successful development of existing and potential business among El Alberto ecotourism developments' (the water park and the ecologic park) is the perception that current and potential indigenous tourism entrepreneurs lack leadership and business skills related to administration such as developing business plans (e.g. strategies, costs, marketing, etc.), and personnel

management (e.g. information, skill development, etc.).

For instance, many of the records at EcoAlberto's parks are neglected, in other words, there are no clear nor transparent mechanisms for monitoring the following: 1) revenues income, 2) company expenses, and 3) any other spending expenditure in the revenue process. Such administrative steps, which would assist the company in tracking its own progress and growth, and allow it to make better management decisions, might be an excellent step forward for the project. This issue can be easily resolve if the company could hire an accountant temporarily to train the personnel and set-up a record keeping system to monitor and create accurate record, figure 64 show a list of some examples of what a record keeping system should include.

**Figure 64 Examples of a Record Keeping Systems**

<p><b>Bookkeeping:</b></p> <ul style="list-style-type: none"><li>- Number of visitors (per day, month, year)</li><li>- Income (daily, monthly and yearly) e.g. entrance, touristic activity parking, restaurant, cabins, etc.)</li><li>- Expenses (daily, monthly and yearly) e.g. temporary workers, kitchen supplies, maintenance supplies, etc.</li></ul> <p><b>Other important records:</b></p> <ul style="list-style-type: none"><li>- Customer service records (have a book for visitors to sign a book with their age, sex, city, country, etc.)</li><li>- Inventory records</li><li>- Et cetera</li></ul>
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Source: author's own elaboration

Furthermore, governments can also offer advise on how to use accountability at the EcoAlberto's parks, and for the further development of ecotourism projects. Also, if EcoAlberto builds new links with the private sector, private companies can also advise on this matter, and together with the government can provide training skills and workshops. EcoAllberto's parks might benefit greatly from regular and innovative training in such skill sets.

#### **8.2.4 Ineffective Marketing**

One of the main obstacles of the development of EcoAlberto's parks is the ineffective marketing planning, since the projects were initiated the administration has struggle to advertise and market its ecologic parks due to the insufficient knowledge, expertise and skills in the area of marketing, publicity and advertising. Furthermore, EcoAlberto's projects have operated for years under no real marketing strategy, although its managers argued to hire a tourism specialist from time to time, their current publicity plan seems to promote the destinations as the managers see it suitable, rather than following a well-established and strong marketing plan, which in some situations can lead to various complications. In one hand, the promotion of EcoAlbertos parks randomly can attract the wrong type of tourists, on the other hand, the lack of a marketing strategy to advertise and promote the eco-parks can result on the absence of visitors. Thus, the outcomes of the same study has showed, the marketing plan to access towards national and international ecotourism markets has not been very successful.

According to data gathered from the fieldwork (2013, 2014) the principal flows found it within EcoAlberto's marketing, publicity and advertising plan are:

- EcoAlberto's marketing plan has not been meticulously elaborated to target the right type of visitors.
- Their own website is quite well designed, but its not promoted efficiently.
- EcoAlberto's small section on CDI's webpage lacks creativity and has not been updated since 2010.
- Handouts, posters and fliers are handed out or putting up mainly along El Alberto's nearby roads, and not much on specific places in the cities.
- Local media promotion, and publicity in local newspapers and magazines consisted in non-creative promotional posters, rather than in informative articles and eye-catching advertising.

EcoAlberto's parks are led by their own members, is a community based ecotourism project, and non-members have no valid opinion within the decision-making and they are very protective of working with outsiders. However, in agreement with Honey (2008), ecotourism as any other type of tourism require the assistance of some marketing professional or intermediary between the indigenous community and the market that the project wants to attract. Consequently, marketing, publicity and advertising needs to be designed in order that the strategies target the segment of the market desired, rather than advertising places randomly.

### **Potential strategies for the promotion and marketing objectives for EcoAlberto's Ecologic Parks**

- Sell and advertise products made by the Hñahñu artisans at EcoAlberto, although this has already been implement, there is a very poor selection of products, a wider range of products should be introduced, one way to do that is to
- Promote small tourism enterprises and create partnerships with other local business owned by Hñahnu people, and
- Develop further the branding name 'EcoAlberto' as potential marketing strategy, the brand has already been used by the water company i.e. *Agua EcoAlberto*, but it can be developed further to create advantages for promotion of handicrafts and other ecotourism products.
- Seek the assistance of the government and the private sector to launch permanent campaigns of advertising and promotion, and increase the information that currently is on the the partners' website (CDI, RIH, tour operators).
- Ensure appropriate distribution and use of printed material, develop a marketing strategy for proper distribution of the material seeking for the right market rather than distributing it randomly.
- Disseminate the indigenous history, values, culture, traditions and the natural richness of the place, introduce and advertise Hñahñu workshops on different themes such as cuisine, traditional stories, or handicraft making, among many others.

There is a wide window for promotion, marketing, public relations and knowledge within the tourism industry in which the Hñahñu community, in which EcoAlbertos' projects need to get involved with. Moreover, strengthening linkages with governmental institutions and develop some with the private sector can also provide services and assistance for EcoAlberto's parks to enhance marketing publicity and promotion strategies. Additionally, these strategic objectives and actions can be achieved and followed by the development of a Marketing Mix Strategy which should include the implementation of strategic lines, linkages with specific organisations, price differentiation and the creation of branding.

#### **8.2.5 Insufficient Policies and Regulations**

To achieve sustainable development, the essential needs of all people, especially for the poor members of the Hñahñu community, have to be met in order to secure a descent quality of life, but without violating human rights or destroying the environment that they all depend on. Empirical evidence suggests that negative impacts can be avoided in many ways if the right policies and regulations are implemented and clear for those who have to follow them.

For instance, many more social benefits can be achieved at EcoAlberto if regulations such as working hours were more flexible. This can be done by setting fair labour standards, focused in the fundamental concepts and idiosyncrasy of social labour in collective systems, but also respecting local and regional legislation. Figure 65 has listed a proposal for fairer labour standards and regulations for those that commit to the year of community service.

**Figure 65. Working hours and days off**

- Keep record of working hours for all the community service personnel (it should include normal working hours, breaks taken and overtime).
- Ensure that normal working hours are established in accordance with the state laws.
- Ensure that overtime does not exceed the limits set by the legislation of the state
- Try to ensure that total working hours do not exceed a determinate de period of hours established (i.e. 60 hours in a period of 7 consecutive days).
- Working hours may exceed the hours agreed in high season of tourism, *faenas*, or other exceptional circumstances e.g. overtime should follow more flexible rules.
- Have a schedule for regular overtime needs and communicated clearly and in advance with all the personnel.
- Ensure that all personnel receive at least 1 day off per 7 calendar days, except when there is seasonal harvest or *faenas* requirements or exceptional circumstances.
- Working hours can be reduced in two turns (7.00-15.00 and 15.00-23.00) most of the time not all personnel is busy, unless is the weekend or holidays, during the week working hours can be more flexible.
- Health and safety standards should be created, to protect the personnel.

Source: author's elaboration

In addition to labour standards and regulations, other policies and commitments should be implement, governments are able to help developing these structures and strategies that can serve human rights and social sustainability, which are important factors, for the success of the ecologic projects. Figure 66 shows a list of policies and commitments that EcoAlberto should introduce or clarify.

The development and integration of these policies and commitments can outweighing current and future the challenges for El Alberto's ecotourism projects. Some ways to achieve the integration of all or some of these policies and commitments is by creating linkages and partnerships with the private sector and the government, these can play a leading role that can aid EcoAlberto to achieve sustainable ecotourism.



**Figure 66. Other Policies and Commitments**

- Discrimination of any form should be prohibited (e.g. gender inequality) and the community service personnel and other employees, should be treated with respect and dignity.
- If a member of EcoAlberto is considered to have the ability to perform certain job, there should no discrimination based on religion, gender, sexual orientation, race, age, disability, political views, etc.
- Equal opportunities for all workers and members (male and female) should be fully respected.
- Maintain clearly defined and documented policies and procedures for the implementation and management and administrations of EcoAlberto.
- Ensure that all regulations such as disciplinary policies and labour conditions and are clearly communicated to the personnel.
- Ensure that policies and procedures are documented, understandable and communicated to the personnel.
- Secure El Alberto's natural resources through their sustainable use.
- Supervise that the creation of new work sources
- Practice measures that include conservation and improvement of ecology
- Obtain Ecotourism certifications
- Equity in the way in which the income or resources are distributed among the local community.

Source: author's elaboration

### 8.2.6 Insufficient Information regarding Programmes and Services

The Hñahñu tourism managers of EcoAlberto's parks do not yet have enough knowledge or comprehension of all programmes and services provided by governmental institutions and private organisations which are available to support them as an ecoproject-led by indigenous peoples, and with the incorporation of sustainable development within their businesses. Insufficient information and understanding of the programmes and services is a clear barrier to successfully access these very helpful programmes. EcoAlberto's management and administration need to be in perpetual contact with governmental institutions, although they are in constant communication with CDI, there are so many other institutions also offer programmes and services that can be of benefit to them.

**Table 22. Governmental institutions that may be of interest to El Alberto's ecotourism projects**

<b>Governmental institution</b>	<b>Interests that can relate to EcoAlberto's projects</b>
CDI	Indigenous peoples, conservation of culture and traditions
SEMARNAT	Protection of the environment and natural resources
SECTUR	Development of tourism and conservation of culture
SAGARPA	Assists towards rural development, agriculture and food
SEDESOL	Social development and poverty reduction programs
SE	Programs for the development of SMEs
SRA	Development of territorial polices in rural areas
CONANP	Conservation of biodiversity and protected areas
CONAFOR	Conservation and restoration of forests
FONATUR	Ensure the sustainable development of tourism
INAH	Protection of culture and heritage
CPTM	Mexico tourism board (develop, plan, advertise tourism)
FINRURAL	Funding and support to rural producers and SME
FIRCO	Promotes agribusiness, rural development social programs
PROFEPA	Advocates for environmental protection

Source: author's elaboration

For instance, as CDI offers programmes and services for indigenous peoples, and SEMARNAT offers programmes and services that are focus on the protection of nature. Hence, there are many more governmental institutions (see figure above) and international organisations (see figure below) similar interests, and a number of programs and services such as can also provide workshops which meet them at a basic level and take them step by step to an understanding of skills that could be offered, providing a greatly needed support.

**Table 23. International organisations that may be of interest to  
El Alberto's ecotourism projects**

<b>International Organisation</b>	<b>Interests that can relate to EcoAlberto's projects</b>
Conservation International	Supports the conservation of natural resources, biodiversity and poverty reduction
GIZ	Provides economic, social and environmental assistance for the development of sustainable tourism
IFAD	Combats rural hunger and poverty in developing countries
IFC	Invests and promotes sustainable tourism-led growth in developing countries
IIED	Works on sustainable tourism projects to lower the impact on wildlife
ITC	Enhances the competitiveness of the tourism sector to achieved sustainable development
IWGIA	Advocates for indigenous affairs such as right to territory, and cultural integrity
ODI	Assists programs for tourism and poverty reduction in developing countries
SNV	Promotes SMEs in the tourism sector, and the protection of the environment
The World Bank	Increases the competitiveness of destinations through tourism
USAID	Provides economic assistance for the development of sustainable tourism
UNWTO	Promotes tourism as a driver for economic growth, inclusive development and environmental sustainably

Source: author's elaboration

### 8.2.7 Lack of Collaboration with the Private Sector

There is a great barrier at the El Alberto when it comes to partnerships for EcoAlberto's Parks. The most difficult barrier to overcome is the collaboration of EcoAlberto's projects with the private sector or any other investment that comes from outside the Hñahñu community (i.e. total absence of regional, national or international investment). This is not for lack of interest from investors, on the contrary, it is the Hñahñu people who do not welcome the investment of the private sector, put it in other words, EcoAlberto is not willing to accept investment from non-members or private business from outside community whether these are foreign, Mexican or from a neighbouring community. The reason is El Alberto's collective land constitution a.k.a. '*ejido*'. Thus, Hñahñu members are legally bound to follow the '*ejidal* system' in which they own El Alberto's territory equally. This means that members of El Alberto inherited the land from their family (e.g. father, grandfather, uncle, etc.), and they cannot sell to outlanders. Nonetheless, businesses partnerships with external investors can be done if approved at the community assembly by an unanimous decision, and yet Hñahñu people are not keen on creating foreign partnerships. Therefore, one of the biggest concerns at El Alberto is 'investment', Hñahñu people from the Mezquital Valley is strong-willed when it comes to indigenous ownership and they prefer to earn less income as long as it is run by its own people, and as they want to have the sole control over the projects, it would be hard (but not impossible) for them to create partnerships or deals with external investors.

Nevertheless, the private sector does not only include big multinational enterprises, private sector investment can also come from creating linkages with smaller scale enterprises such as local businesses. According to the tourism value chain analysis there are a few local businesses that supply EcoAlberto on a normal basis but without any agreement, thus EcoAlberto only buys from them what it is needed (e.g. food supplies). Partnership and linkages with the local businesses could be a solution for the 'we-do-not-partner-with-non-members' situation, and yet, Hñahñu people have no money to invest, a few artisans and handcrafters have invested to establish local micro businesses and other have been initially funded by some

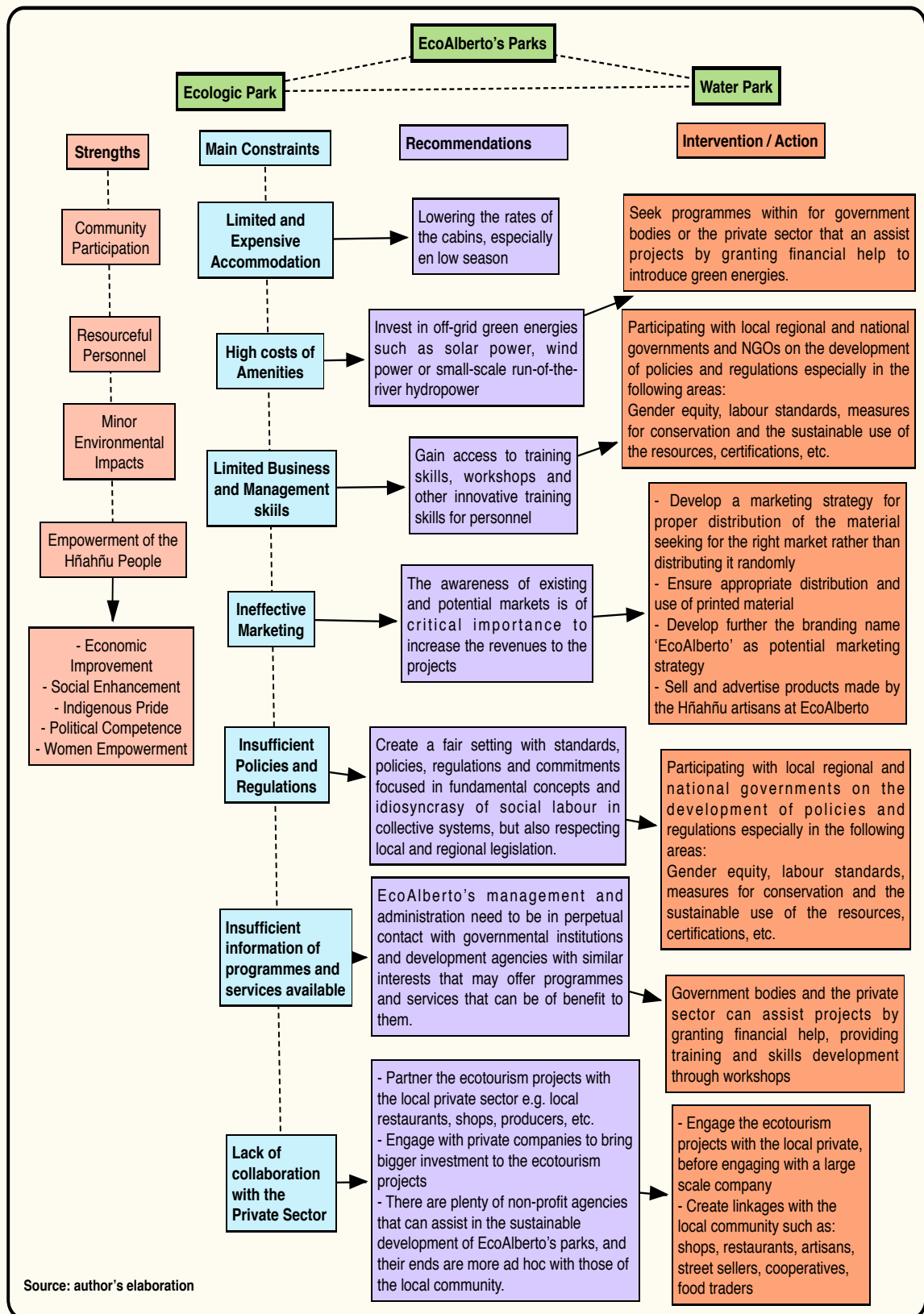
governmental programs to initiate their small businesses such as *Agua EcoAlberto* and the women's cooperative.

However, the results of the study showed that EcoAlberto's principal stakeholders (e.g. Hñahñu members, especially the administration) have no interest in forming partnerships nor joint ventures with the external private sector at the moment, they will continue their odyssey by themselves, and they most likely will seek to obtain more governmental funds. Although, it could be worth it to present the idea to create linkages with private sector companies in the community assembly after all the private sector includes different types of companies; for instance, there are plenty of non-profit agencies that can assist in the sustainable development of EcoAlberto's parks, and their ends are more *ad hoc* with those of the local community.

### **5.3 Conceptual Framework of EcoAlberto's Constraints and Recommendations**

EcoAlberto should improve its linkages with the local community, to have more effective participation and influence among the local economy, the company should engage directly with suppliers, particularly food suppliers and street sellers, in order to help these section of the community who earn the less, to have a bigger share within the tourism value and supply chain process. The figure below summarises main constrains identified in the case studies while carrying out a tourism value chain analysis in both EcoAlberto's parks, the figure also below recognises influential factors such as the strengths of EcoAlbertos parks, and includes recommendations for potential interventions and linkages to take into account by stakeholders (e.g. members of El Alberto, governmental institutions, the private sector) in the form of a conceptual framework that can aid EcoAlbertos to improve its projects and to continue to employ ecotourism for the achievement of the SDGs.

**Figure 67. Conceptual Framework of EcoAlberto's Constrains and Recommendations**



## 5.4 Conclusion

This chapter analysed the TVC of El Alberto's projects, highlighting the significant positive impacts that the projects, with its two distinct aspects of a Water Park and an Ecological Park, has brought to the local indigenous community. In particular, it identified and explained several important multiplying factors, especially the impact on illegal migration. The chapter also demonstrated how, in the TVCA, it was possible to confirm that at each of the nodes, the actions of the community were crucial to the success of the project. Several important shortcomings were identified in the context of the analysis, and further development with a conceptual framework that summarises the main constraints and recommendations concluded by the study. However, in conclusion, through the tourism value chain analysis carried out in this doctoral research as a contribution to the field of tourism studies, it is clear that the various aspects of this project have enabled the community to take significant advantage of innovative and emergent relationship sustainable development, poverty alleviation and ecotourism approaches, towards securing their own achievement of the global SDGs at the local level.

## **CHAPTER SIX - Conclusions: Making Indigenous Ecotourism Work**

### **6.1 Introduction**

Ecotourism draws on the cultural and ecological capital of indigenous communities and employs a high proportion of local groups and engages SME including those from the informal sector. Consequently, ecotourism may be a viable source for sustainable development in regions with few development options. By bringing together and highlighting the findings from the previous chapters, the research reveals broader implications. The TVCA undertaken in this doctoral research suggests elements of further ecotourism projects, which may work in the case study community, and in other indigenous communities of Latin America. These key elements can be useful for the effectiveness and improvement of ecotourism in the region, to help countries and indigenous peoples to reduce poverty, and to achieve the global SDGs.

Chapter Four provides the conclusions of this thesis, and summarises lessons learned that may be useful for future research such as key elements and recommendations to take into account for future research or the development of ecotourism initiatives, for example: indigenous inception, government assistance, effective marketing and private sector involvement. A conceptual framework for future research with the findings identified in this study through (1) the review of extensive literature on ecotourism, poverty reduction and sustainable development, and (2) the outcomes of the TVCA carried out in two ecotourism projects at the Hñahñu indigenous community of El Alberto, Hidalgo in Mexico. Additionally, it provides the contributions of the study, a synthesis of the the responses to the research questions and the final remarks of the study



## 6.2 Contributions of the Study

Prior research has yielded mixed findings in relation to ecotourism, sustainable development, poverty reduction, indigenous peoples and TVCA. Most field research, however, consists of thematically or geographically specific case studies that are particularised, rather than providing in-depth, coherent and structured research based on the integrated application of relevant new approaches. For instance, in Mexico and other Latin American countries, the TVCA is a fairly new research approach that has not yet been widely applied. It has rather been focused on PPT, but much less on ecotourism and sustainable development. This doctoral document has undertaken a TVCA of two ecotourism projects based in a Hñahñu community of Mexico, and it has evaluated the outcomes in an integrated manner for sustainable development. Findings of the study have demonstrated the financial and non-financial benefits and impacts of ecotourism in the lives of the locals, identifying lessons learned that can assist indigenous peoples to strengthen their ecotourism endeavours and participation with the tourism value chain. Hence, the three principal contributions of the doctoral thesis are:

First, this research has contributed to the current body of knowledge, especially in literature regarding development studies and the tourism discipline. The study has connected the conceptual debates and theoretical perspectives on the links between ecotourism, indigenous peoples and poverty reduction to achieve sustainability, and it has expanded the the body of knowledge within the literature by analysing the evolution of sustainable development planning and policy-making commitments in relation to indigenous peoples well-being in recent years, hence, contributing to indigenous peoples studies particularly in debates concerning poverty reduction, social exclusion, marginalisation, natural resources, inter-generational equity and indigenous empowerment.

Second, despite of not being a research objective per se, the study has also expanded on the literature of the TVCA, a fairly new methodical approach, that is an alternative approach to the classic value chain analysis. The researcher contributed to the literature with debates on the appearance and purpose of the TVC, its barriers and opportunities, and to the body of knowledge with a proposed TVC framework

typology that integrates the best qualities of the main methods used in the value chain analysis within the tourism sector, which was the approach followed to analyse the ecotourism case studies.

Third, as such, this thesis provides an original contribution to the literature, and to our understanding of how to assist the implementation of the SDGs for sustainable tourism that can help to reduce poverty and promote sustainable livelihoods for local communities; by providing new evidence that poverty reduction objectives for sustainable development can be achieved through ecotourism projects led by indigenous communities. Based on the TVCA carried at EcoAlberto, the thesis findings showed that performance on the TVC at El Alberto has maintained the viability of the ecotourism venture, even as there remains room for the improvement of ecotourism management to better foster sustainable development and poverty reduction within the process.

## **6.3 Lessons Learned for Further Research**

Building on preceding analysis this section suggests key elements that may help others to support further development of indigenous ecotourism projects in Mexico and Latin America. These lessons include recommendations on the weight of indigenous inception as a local initiative, community engagement, transparency and accountability, gender equity, effective marketing, support not barriers from the government, and the right involvement of the private sector involvement.

### **6.3.1 Community Engagement in Ecotourism: Indigenous Inception as a Local Initiative**

The development of an ecotourism project can be greatly enhanced if the project is generated and led by the inhabitants of the destination, but with the initial financial support and accountability of partners. This is a pivotal element for the sustainable development of an ecotourism project based in indigenous or isolated rural situations. In the case of EcoAlberto, the initialisation impetus of the Hñahñu members of the community itself, local leadership, is demonstrated as a crucial element of the sense of ownership of the indigenous people, their engagement throughout the initiative, and their own successful implementation of two ecotourism projects (the ecologic park and the water park). The initiators of this community-based ecotourism project, as members of the Hñahñu community, saw the project as an economic alternative that could help stop their members from migrating to the US. They started the project themselves and then sought and garnered support from diverse government organisations. In the case of Mexico, other ecotourism projects may have been imposed by the government for different political reasons, have led to the mismanagement of the projects due to the lack of commitment, interest, ownership and organisation of the inhabitants. In this instance, the local inception and leadership, in response to a pressing need that was understood and felt by the community itself, led to the appropriate care, commitment and accountability being adopted by the leaders of the indigenous people, and by its members who were also beneficiaries.

## **Transparency and Accountability**

An ecotourism project requires transparency and involvement of the local community (e.g. micro enterprises, members) throughout its implementation process and during monitoring and evaluation, as well. As Ashley et al. (2009) has argued, there is a pressing need for strategies to enhance policy and progress among indigenous peoples to support the sustainable development of their community through ecotourism projects. For instance, EcoAlberto as a company gained the capacity to engage and participate with local associations and cooperatives, in order to build strong and enduring participatory links with the government programmes, the private sector and the other stakeholders. The transparency and accountability which provided the foundations for this community and stakeholder engagement is clearly essential to ensuring that sustainable development truly benefits the locals especially the most vulnerable groups, and that the project continues to address community concerns as they arise. As seen in the case of El Alberto, the high level of informed and transparent engagement and participation in decision-making by the Hñahñu members at the community meetings, leading to accountability and commitment to their role towards the sustainability of the project is perhaps one of the most important keys for its success. This type of participation also secures transparency about the ways that benefits of ecotourism are distributed and shared among the different groups, reducing the potential for disputes.

### **6.3.2 Ecotourism can aid decreasing Gender Inequality**

Indigenous men and women perform different functions and have different responsibilities in traditionally established indigenous communities such as the Hñahñu community of El Alberto. As reviewed earlier in this thesis, in most of the cases involving indigenous peoples, also refer to gender inequality; women not have the same rights, access and control over the land as men. Gender inequity is only the result of indigenous traditions, where it has been assumed among the inhabitants' beliefs that men should do the hard labour, while women should look after the house and children. For instance, some of the outcomes of this research showed that Hñahñu women and Hñahñu men, do not have equal rights at El Alberto, and it has been this way for a long time, yet, with the international migration of a very high percentage of Hñahñu men, the implementation of ecotourism, and the creating of women-led businesses at the community, the division of labour and rights over land started became more flexible to women.

It won't be easy for future ecotourism initiatives to reach agreements regarding gender inequity, especially when indigenous traditions have been shaped that way for so long. Nonetheless, based on the research outcomes presented in Chapter Five of this thesis, ecotourism development can contribute towards gender equality progressively, especially in changing societies seeking for new economic opportunities such as indigenous communities where people have already experienced inequality and discrimination in one form, thus, it will be easier for them to identify discrimination in other forms. Furthermore, not only the case studies analysed in this thesis have shown that the incorporation of ecotourism projects in indigenous communities reduces gender inequality and female empowerment, also other case studies analysed within the literature showed similar positive outcomes where women have progressively gain their rights to land and to participate in the decision-making process to resolve community issues. Consequently, it can be argued that, ecotourism can also decrease gender inequity, and move indigenous communities a step closer towards gender equality.

For that reason, future ecotourism initiatives and developing plans should include on their agendas, strategies to eliminate major constraints to the sustainable development of indigenous communities, such as gender inequality; with the support

of governmental organisations, NGOs, and other type of partnerships. This should be a primary objective in order to achieve Goal number 5 of the World's SDGs: to empower of all women, and end with all forms of gender-based discrimination.

### **6.3.3 Reach out for Marketing and Publicity**

A successful indigenous ecotourism project still needs to engage clients and reach out, using adequate plans for planning and implementation of marketing and publicity. This is also a central lesson to learn; to approach and attract the right market is crucial towards the sustainable development of both EcoAlberto projects, and the local community of El Alberto. The tourism value chain analysis identified a growing need to develop existing and new potential markets in order to increase the revenues by increasing tourists' arrivals. It demonstrated that the projects have considerable room to expand without yet reaching a saturation point, i.e. to develop wisely and sustainably in accordance with the indigenous community's values itself. With the benefit sharing and transparency mechanisms that are currently employed, amplified marketing and client engagement in tourism activities and services is likely to lead to the creation of more sources of employment and higher community social and livelihoods advantages. Such an ecotourism project can benefit substantially from the good management of its marketing; attracting responsible visitors who will be sensitive to the natural resources, and also by employing simple ecotourism principles both for management of the project, and protection of the natural environment. Further, the clever use of marketing tools, build on the foundations of suitable plans that can access existing and new networks across national and international circles could make the difference between attracting more recipients and struggling with a few. To address this challenge, the engagement of broader marketing and outreach skills and strategies is needed to generate, increase and manage positive benefits.

#### **6.3.4 The Role of the Government: Support not Barriers**

Indigenous peoples' projects need governments not to interfere, but rather to support and create ecotourism-friendly policies and laws. Governments play an indispensable function in the incorporation of ecotourism projects, one of the core commitments of local and national authorities is to promote and prioritise the sustainable development of the indigenous communities, taking into account their cultures and unique traditions, in order to enhance their quality of life and contribute to poverty elimination. There are many factors that government can contribute to the success of these indigenous-led ventures, particularly through new policies backed by regulations, institutions and financial mechanisms, as well as to monitor that policies are practiced effectively. However, amongst the most frequently noted problems within governmental agencies is their tendency to slow down processes due to the bureaucracy of the systems involved in the implementation of policies and regulations; additionally, consultations with governments can be hostile which can cause long-lasting and complicated step-wise processes for indigenous communities interested in access to funding, maintenance or credits. This attitude can serve to discourage indigenous people from getting involved, and it is complicated to find a way to deal with obstructive procedure. Therefore, rather than interfere in the process by setting out more barriers to ecotourism development, instead government organisations should support these initiatives through the formulation of ecotourism-friendly policies and laws. They can provide the requisite conditions for the success of these indigenous initiatives among the tourism industry, as well as offer further incentives and commitments through cost-internalisation regulations, subsidies, tax incentive and other supporting actions. Sometimes, especially in developing countries, the commitment to ecotourism by relevant government ministries and bodies is non-existent, fortunately, in this particular case study, it was possible to identify at least three or four governmental organisations such as the National Commission for the Development of Indigenous Villages, which has become an indispensable support in the establishment of ecotourism and alternative tourism among the indigenous communities at a national level, and their contribution to poverty reduction is indisputable and most welcome.

In consequence, governments are one of the principal actors in establishing ecotourism practices, especially in developing countries. Based on cases reviewed in the literature, and the outcomes of the fieldwork carried out in the Hñahñu indigenous community of El Alberto, Hidalgo, Mexico. This doctoral thesis argues that the participation of local and national governments in the development of ecotourism projects can be crucial for their success especially in the beginning of the initiatives, thus, this study suggests to local and national government bodies and institutions to take into account the following recommendations as lessons learned in order to support ecotourism development.

**Figure 68. The Role of the Government: Recommendations from Lessons Learned**

1. Government bodies can assist projects by granting financial help, providing training and skills development through workshops
2. Governments can offer advice in technology programmes on how to use accountability for the further development of their projects, and training of personnel and local businesses to support sustainability
3. Government can aid ecotourism projects to be transparent and involve the local community and other stakeholders throughout the development of plans and during monitoring and evaluation
4. Governmental institutions and NGOs, should assist indigenous communities that use *cargo*, or *communal systems* to develop new policies concerning labour standards, such as flexible working hours
5. Governments in consultation with employers and workers should implement labour law and social policies, starting by setting out basic principles and rights at work
6. Governments should promote the awareness of existing and potential markets to increase the revenues to the projects, this can be done by developing ecotourism incentives, financial assistance and the improvement of SMEs.
7. Government can enhance better environmental policies and plans at local, regional and national level to support the sustainable development of indigenous communities through ecotourism projects and to initiate ecotourism certification programmes
8. Governmental institutions should develop a system or indicators to monitor ecological sustainability and benefits obtained by vulnerable and disadvantaged groups of people
9. Governments should raise awareness and create policies and regulations that support women participation among ecotourism projects to achieve gender equity
10. Governments need to ensure that all stakeholders of the ecotourism project (e.g. local community, private and public sector, etc.) are aware that it is essential to follow policies in order to achieve sustainable development that truly benefits the poor, and that the project continues to address community concerns as they arise

Source: author's elaboration



### 6.3.5 The Right Involvement of the Private Sector

As previously seen in the outcomes of the tourism value chain analysis (in chapter five), the private sector has little participation within the Hñahñu ecotourism projects, this is due to their '*ejidal*' or collective system, but also to the private sector's bad reputation. It has been recognised in many instances among literature and case studies that the private sector tends to exploit the market demand through the unsustainable use of the natural resources. For instance, the inhabitants of El Alberto regard international tourism companies as bad news, they consider that most tourism companies are known for damaging the natural resources, polluting the environment, and taking advantage of local people by retaining most profits, and leave little or none for the local community surrounding the ecotourism developments. Thus, it can be very discouraging for local communities to develop partnerships with new companies if all they know is that the private sector involved in ecotourism is not producing what they considered to be favourable outcomes. The simple truth, is that due to these reasons not only the Hñahñu inhabitants of El Alberto, but many other indigenous peoples distrust the involvement of new companies.

Nevertheless, as stated earlier, the benefits that the private sector can bring to local communities should not be overlooked in spite of negative outcomes. What ecotourism projects need, is the right involvement of the private sector. For instance, giving its predominant role in the development of tourism, there are also many companies from the private sector that have worked hard to have a favourable contribution to ecotourism; companies working in sustainable tourism initiatives have made considerable contributions to ecotourism by directing the tourism sector to achieve ecological sustainability and benefiting vulnerable and disadvantaged groups of people, thus, as well as creating positive outcomes for their own businesses.

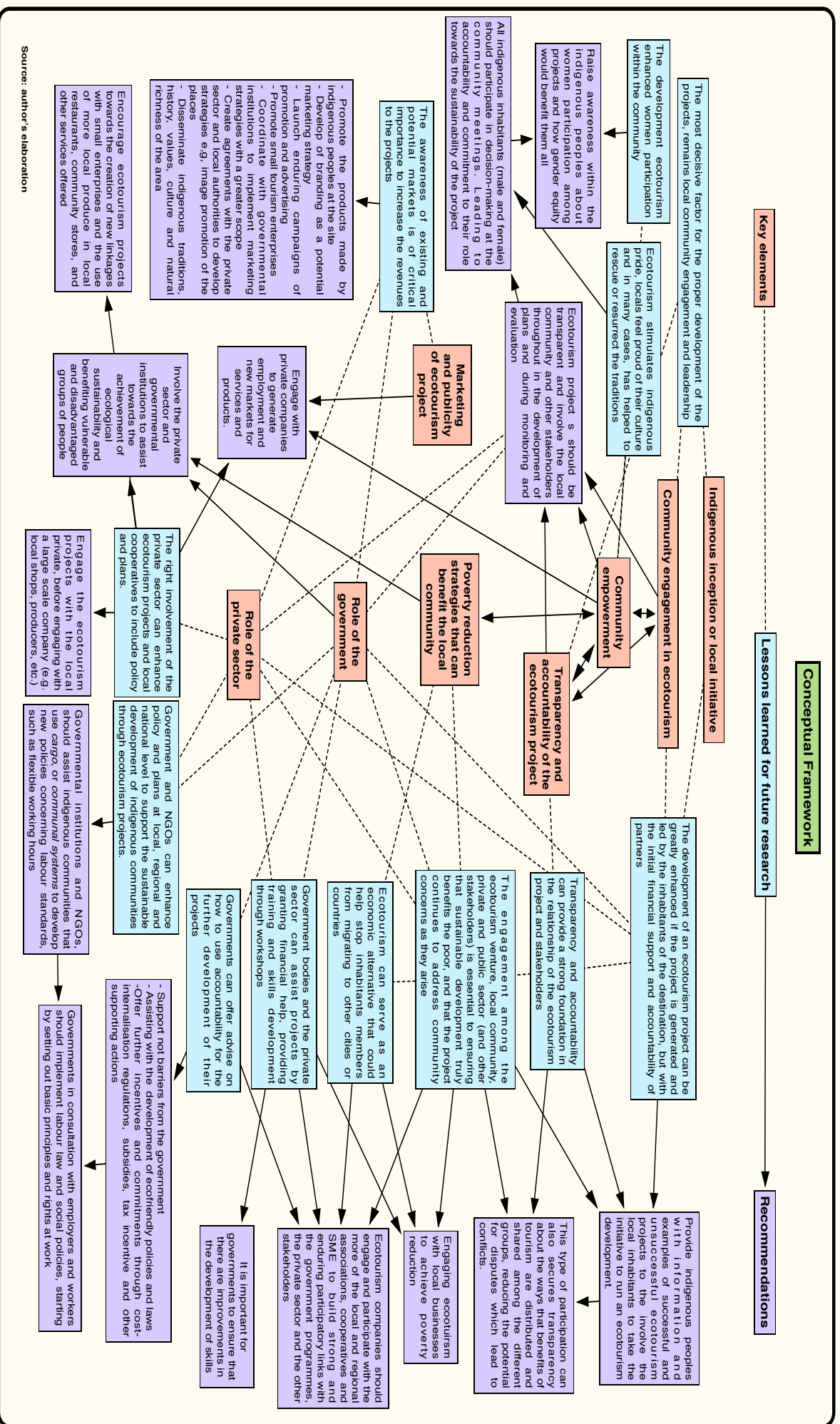
The private sector can, in addition to government efforts, assist in the development of infrastructure (e.g. reinforcement and constructions of roads, provide financial support for the implementation of renewable energy), and contribute to other financial and social aspects towards the sustainable development

of private initiatives. Private companies can generate employment, and a new market for new services and products, as well as support towards the development new linkages, encourage the creation of small local businesses, and the use of more local produce in local restaurants, community stores, and other services offered. Furthermore, in cooperation with various governmental institutions, NGOs, and development agencies can offer workshops and suitable training for personnel and the local community. In the long run, it is vital that the private sector collaborates in engaging visitors and reaching out more for a segment of the market that appreciates and protects the distinctive attractions of the ecotourism initiatives. There is plenty to do in order to have successful ecotourism projects, and the private sector businesses are a significant part of the process.

#### **6.4 Conceptual Framework: Lessons Learned for Future Research**

The figure below summarises lessons learned that may be useful for future research. The the key findings identified in this study through, are based on the review of extensive literature on ecotourism, poverty reduction and sustainable development, and the outcomes of the tourism value chain analysis carried out in two ecotourism projects at the Hñahñu indigenous community of El Alberto, Hidalgo in Mexico. Additionally, the figure below recognises influential factors such as key elements and recommendations to take into account for future research or the development of ecotourism initiatives, for example: indigenous inception, government assistance, effective marketing and private sector involvement. This is outlined in the form of a conceptual framework that can aid to use ecotourism for the achievement of SDGs.

**Figure 69. Conceptual Framework: Lessons Learned for Future Research**



## 6.5 Synthesis

The present investigation has successfully achieved its objectives. Thus, this section provides a brief summary of the four research questions that have been answered throughout this investigation to achieve the thesis its objectives.

First, to answer the research question number one, the author identified that the international commitments on planning and policy-making have evolved towards the importance of indigenous peoples sustainability, ever since the ILO Convention No. 169, which was mainly about indigenous peoples' rights to their lands and territories, a trend towards the recognition of indigenous rights was initiated, numerous convention and declarations began the recognition of indigenous rights, such as the World Conference on Human Rights, and later towards more environmental-friendly commitments and declarations such as the Rio+20 - where indigenous peoples were fully acknowledged as a 'major group' and were also enable to participate in policy-making on sustainable development. Poverty reduction in marginalised and indigenous regions has also been in the top of the development agenda (among many other sustainability issues) since 1992, with Agenda 21 and again in 2000 and 2015 with the MDGs and the SDGs, respectively. Unfortunately, development interventions for indigenous peoples remain infrequent or disregarded by the rest of the population, many of them are even inadequate and often unable to understand or respect their needs or interest, and there are far too many instances globally where discrimination, marginalisation and poverty are wearing down their well-being. However, with the emergence of the UNPFI in 2002, indigenous peoples per se have the opportunity to participate on the decision making of their own affairs e.g. economic and social development, cultural and environmental matters, among many others.

Second, to answer research question number two, the investigation mapped out the tourism value chain analysis of the actual financial and non-financial benefits that ecotourism brings to the Hñahñu indigenous community of Mexico; by examining the participation of indigenous peoples among the tourism value chain, the empirical evidence shows that both financial and non-financial benefits are present at the Hñahñu local community. On one hand, due to El Alberto's rare operational system also known as *ejidal* or collective system, financial benefits direct

to the Hñahñu people are limited, but it has reduced poverty, moreover, 40% of EcoAlberto's capital is employed to ameliorate of the livelihood of the Hñahñu people. On the other hand, non-direct financial benefits are great and visible throughout the community. The inception of ecotourism at El Alberto has empower the Hñahñu people socially and politically, creating a sense of cohesion among its members, it has also contributed to the enhancement of female leadership, indigenous pride and reduced illegal migration. Hence, the outcomes of the TVCA has demonstrated that these ecotourism projects are distributing benefits to the local communities, especially those living in poverty.

Third, the research question number three is linked to number two (i.e. the results of the question two can answer question three), thus, the empirical evidence obtained through the TVCA argues that EcoAlberto's parks are not exactly thriving in finances (due to various constrains), and yet, the ecotourism projects are financially viable (so far), this is perhaps a result of the *ejidal* or collective system in which there are no salaries to play to most of EcoAlberto's personnel. Consequently, the analysis of the tourism value chain has established potential interventions and recommendations on how to overcome those constraints for ecotourism projects, to remain viable. Some of these are: seeking support from governmental organisations establish policies and regulation, create linkages with the private sector through local business, develop an appropriate marketing strategy among others.

Lastly, research question number four was answered based on literature reviewed of existing case studies in relation to indigenous peoples, ecotourism and TVCA, but mainly based on the empirical evidence of the TVCA carried at EcoAlberto's parks in chapter five. Thus, it can be concluded that poverty reduction and the SDGs can be achieve in indigenous communities if meticulously planned, and following certain key factors as the lessons learned presented earlier in this chapter, including: planning and decision-making by the indigenous peoples as a local initiative, transparency and accountability of the ecotourism projects, developing friendly non-discriminatory polices such as gender equality, make sure to reach out for marketing and publicity, the role expected by the governments, to support ecotourism with friendly policies instead of building barriers, and finally the importance of collaborating and creating partnerships with the private sector

## 6.6 Final Remarks

Ecotourism developments such as EcoAlberto have achieved outstanding results in upholding their socio-cultural heritage. This is handled in a clear hierarchical system with clear roles, highly defined services, active participation of all families, and a community that stands as a great example of the rescue of customs and cultural traditions. The park's managers are active advocates of careful management and governance natural resources, and are promoting a special indigenous-led model of tourism activities based on recognised principles of sustainable tourism and ecotourism.

The findings of this doctoral thesis have demonstrated that the implementation of ecotourism practices are an emerging activity among developing countries. It appears likely, from the context of the research, that a less than enthusiastic level of interest from policy makers and incomplete commitment by the local communities have been the main constraints to the development of these practices in other instances. In certain cases, that were reviewed within the literature, the impetus for the ecotourism venture came from outside the community, and the benefits were imperfectly or un-transparently shared. The indigenous peoples, inhabitants of the communities where the ecotourism projects were based, did not know how to deal with tourism, and together with weaknesses or gaps in administration and equitable benefit-sharing, also lack of committed engagement and participation by the local community, the projects create the contrary of what ecotourism stands for. The case studies investigated in this doctoral project provides an important counter-example, demonstrating that in certain instances, indigenous peoples can manage their own business without requiring special qualifications, even if they do need to improve some of their approaches. Even in this case study, it was noticeable that the weight of policies and involvement from the governments to help the local initiators to start the business made a difference. CDI has already given much of financial support, but continues to monitor the project to make sure it continues to be viable and to deliver on its social, economic and environmental objectives. The investigation also highlighted that poverty reduction can be done and the achievement of substantial benefits is possible, if the founding initiatives are carefully conceived and established in a manner that takes the needs and interests

of the local community as primary. In the indigenous community of El Alberto, tourism contributes to poverty reduction by employing some EcoAlberto's revenues to ameliorate the livelihood, and generating and spreading employment opportunities, which deliver added income and contributes to an improvement in the circumstances of the locals by increasing the range of economic possibilities available to the poor.

The pivotal objective of this doctoral research was to assess the potential for ecotourism to reduce poverty and achieving sustainable development. The doctoral thesis has achieved it, by mapping and evaluating the TVCA carried at the indigenous community of El Alberto, the findings of this fieldwork analysis have lead the research into substantial practices and experiences on the ground amongst indigenous communities of Mexico. This thesis has surveyed and reviewed the literature on the links among ecotourism indigenous peoples, sustainable development and poverty reduction discovering the idea of ecotourism, how planning and policy-making on indigenous peoples' sustainability has evolved in recent years. Moreover, the thesis has mapped the tourism value chain analysis on the actual financial and non-financial benefits of a selected indigenous ecotourism in a small community of Mexico, examining the participation of indigenous peoples among the tourism value chain, and identifying constraints that restrict term from benefiting from the tourism industry, establishing key strategies and recommendations on how to overcome those constraints for ecotourism projects, to be viable. It has demonstrated that these ecotourism projects are distributing benefits to the local communities, especially those living in poverty.

Additionally, the thesis has provided an interpretation of these findings, focusing in Mexico as an example which may be relevant to other emerging and developing nations, by examining and comparing, based on the field research, the strengths and weaknesses of the case study along the tourism value chain analysis. Through the TVCA, it has considered issues such as insufficient businesses and management skills, lack of collaboration with the private sector, amenities and accommodation of the products and services offered by the venture. Moreover, this thesis has presented suitable recommendations for new strategies to overcome barriers to indigenous participation among TVC such as strengthening local linkages, to keep up with the positive community engagement within the ecotourism

project, developing small business and economic activities around and the outside the ecotourism project or at the local community, as well as to and to undertake a proper broader marketing and outreach. Lastly, the thesis has offered lessons learned for research and analysis that are relevant to others in Mexico and other developing countries around the world. These lessons are summarised in a conceptual framework, which emphasises on the weight of the community engagement in ecotourism through indigenous inception as a local initiative, transparency and accountability, the role of the government, successful marketing, and the right involvement of the private sector.

Consequently, the thesis has sought to contribute to the literature on whether poverty reduction for sustainable development can, realistically, be achieved through the implementation of ecotourism projects among indigenous communities. The researcher concludes that this possibility is a worthwhile goal, and one that has many possibilities of being realised, towards the implementation of the global SDGs through indigenous-led ecotourism.



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## Appendices

### Appendix A: Manager Interviews and Questionnaire

#### Cuestionario Turismo México

Buenos días, mi nombre es Dalia Lara, me encuentro haciendo una investigación sobre la sustentabilidad de proyectos ecoturísticos exitosos y su cadena de valor en comunidades indígenas de México. Podría usted ser tan amable de contestar las siguientes preguntas de acuerdo a su empresa ecoturística. Tomara al rededor de 20 minutos.

#### Parte 1: Información de la Empresa Turística:

##### Nombre:

Dirección: País: Teléfono: Email: Website:

##### 2. Por favor describa el lugar de la empresa:

*Incluya la distancia y dirección del aeropuerto más cercano, atracciones principales, etc.*

##### 3. ¿Cuándo abrió sus puertas al público?

##### 4. ¿Cuales son los temas de la empresa?

Aventura/Deporte                      Parques y áreas naturales                      Cultural  
Desierto                      Conferencias/Negocios                      Playa  
Parques acuáticos/Spa                      Avistamiento de animales                      Montañas  
Otro (favor de especificar): \_\_\_\_\_

##### 5. ¿Que tipo de hospedaje se ofrecen y cuanto cuesta?

Tipo de hospedaje      \$Temporada Alta      \$Temporada baja      \$por persona/cuarto

##### 6. ¿Cual es su capacidad máxima de alojamiento?

##### 7. ¿Cual es su capacidad máxima durante el día (personas pueden visitar el mismo día y al mismo tiempo una actividades en común)?

##### 8. ¿Que mes(es) del año es cuando se encuentra abierto al publico?

##### 9. ¿Qué día(s) de la semana es cuando se tiene mas visitantes?

##### 10. ¿Cuales son los meses con mayor demanda de los visitantes?

##### 11. ¿Cual es la procedencia de los turistas?

##### 12. ¿Cuantas personas pernoctaron en la empresa en los últimos 12 meses?

##### 13. En promedio, ¿cuantas personas pernoctan por día en cada temporada? Especifique cuales meses representan las temporadas para su empresa:

a. Temporada Baja                      Meses:  
b. Temporada Alta                      Meses:  
c. Semana Santa

##### 14. Aparte de las pernoctaciones, ¿cuantos visitantes de día recibieron en los últimos 12 meses?

##### 15. En promedio, ¿cuanto gasta un turista en comida por día en su empresa turística?

Si no sirve comida, escriba N/A

##### 16. Por favor escriba una lista de las actividades/excursiones que la empresa ofrece, el numero de días de duración, servicios y precios.

Si se encuentra una manera mas fácil, anote la pagina de internet donde se encuentra la lista.

#### Parte 2: Conservación y Áreas Protegidas

(Escriba N/A si no aplica)

##### 1. ¿La empresa turística apoya la conservación de la naturaleza

Si      No-Si respondió Si, como?

##### 2. ¿Hay áreas de conservación en las inmediaciones de la empresa turística?

Si      No-Si respondió Si, ¿Cuál es su área?



**3. En promedio ¿qué porcentaje de sus huéspedes estima usted que visita el área protegida durante sus viajes?**

25%      50%      75%      100%

**4. ¿La empresa ofrece visitas guiadas u otros servicios turísticos (Ej. transporte) para los áreas protegidas?**

Sí      No

**5. En promedio ¿qué porcentaje de sus clientes está atraído por motivo de visitar los áreas protegidas?**

25%      50%      75%      100%

**6. ¿Su publicidad menciona el área protegida como una de las atracciones del lugar?**

Sí      No

**7. ¿Tiene la empresa una relación entre el personal del área protegida en trabajar juntos sobre los temas del manejo de los áreas o el turismo?**

Sí      No

**8. ¿Cuáles otros beneficios recibe la empresa por estar cerca de los áreas protegidas?**

**9. ¿En qué proyectos de conservación se encuentran involucrados los trabajadores y/o los miembros de la comunidad como resultado del turismo?**

### **Parte 3: Cultura**

**1. ¿Ofrece la empresa turística atracciones culturales?**

Sí      No      -Si respondió Si, Cuales?

**2. ¿Cómo se conserva la cultura como resultado del turismo?**

**3. ¿Quién ofrece estas actividades y cómo se paga por ofrecer las actividades?**

**4. ¿Son los materiales y estilos de construcción de origen local?**

### **Parte 4: Educación**

**1. ¿Ofrece a sus visitantes con alguna introducción o experiencia educativa de la zona que se esta visitando?**

Sí      No      -Si respondió Si, como/cuales?

**2. ¿Son educados los miembros de la comunidad cultural y/o ambientalmente debido al turismo?**

Sí      No      -Si respondió Si, como?

### **Parte 5: Propiedad**

**1. ¿Cual es la forma de negocio?**

Empresario individual      Propiedad conjunta      Organización comunitaria

Sociedad anónima      Organización no gobermental (ONG)

Otro (favor de especificar):

Notas adicionales:

**2. ¿Esta empresa turística es Joint Venture (empresa conjunta)? (entre comunidad, organización turística u otra organización)**

Sí      No

-Si respondió Si, cual es el nombre de la empresa/organización?

**3. ¿Originalmente, la empresa fue patrocinado/apoyado por una organización? Ej.: CDI**

Sí      No

-Si respondió Si, cual es el nombre de la empresa/organización? Y de que manera apoyo a la empresa turística?

**5. ¿Hay alguna otra organización que le asista en la operación de su empresa turística?**

Sí      No

-Si respondió Si, quienes son? y por favor describa de que manera asisten?

### **Parte 6: Empleo**

**1. ¿Cuántas personas trabajan en la empresa turística?** \_\_\_\_\_

Hombres \_\_\_\_\_

Mujeres \_\_\_\_\_

Indígenas \_\_\_\_\_

Tiempo completo   Medio-tiempo   Por temporada

Pertenecientes a la comunidad:

No Pertenecientes a la comunidad:

**2. ¿De que manera llegan los empleados al trabajo? (autobús, caminando, etc.)**

**3. ¿Cuales son las funciones de los empleados? Que puestos desempeñan?**

**Cuanto ganan?**

Cocinero:      Guía de turistas:      Recepcionistas:      Otros:

**4. ¿Cuántos de los empleados cuentan con alguna certificación/ título en turismo?**

## **Parte 7: Impacto Local y Beneficios**

**1. ¿Cuántos fueron los ingresos por año?**

2010:

2011:

2012:

**2. ¿Cuántos son los gastos laborales promedio mensuales** (incluya los empleos generados por tiempo completo y medio tiempo)?

**3. ¿Cuántos son los gastos operacionales (no laborales) promedio mensuales?** (renta, electricidad, comida, transporte, equipo, mantenimiento, etc.)

**4. Después de pagar todos los gastos ¿cómo se distribuyen los beneficios? (en porcentajes)**

Reinversión en la empresa turística / Miembros individuales de la comunidad / Proyectos comunitarios o de ONG

%- Educación    %- Salud    %- Infraestructura de la comunidad    %- Conservación    %- Otro

**5. ¿Obtiene la empresa turística beneficios?**

Si    No                      -Si, Cuanto fueron esos beneficios?

2010

2011

2012

**6. ¿Recibe la comunidad beneficios directos?**

Si    No

**7. Además del empleo, ¿de que otra forma crees que la comunidad se beneficie de la empresa turística?**

Si    No                      -Si respondió Si, de que otra manera se benefician?

**8. ¿Cual es el numero de habitantes de la comunidad?** \_\_\_\_\_

**9. ¿Con que servicios locales cuenta la comunidad?**

*Ej.: centro de salud, escuelas, servicios de emergencia, policía, ambulancia.*

**10. ¿Con que infraestructura cuenta la comunidad?**

*Ej.: carreteras, transporte publico, calles pavimentadas, electricidad, agua potable, baños.*

**11. ¿Los productos usados por la empresa turística son comprados localmente?**

Cuales?                      Donde?

**12. ¿Que porcentaje o que tipo alimentos son producidos en la región?**

**13. ¿Que otros negocios/micro empresas son apoyados por esta empresa turística?**

*Ej.: restaurantes, tiendas de recuerdos, artesanías etc.*

**14. ¿Cuántas personas (indígenas) son empleadas por estos negocios/micro empresas como resultado de la empresa turística?**

## **Parte 7: Organización y Desarrollo del Turismo**

**1. ¿Existe algún otro plan de turismo para el área?**

Si    No                      -Si respondió Si, cual (es)?/ de que tipo?

**2. ¿Tiene la empresa turística alguna una estrategia de desarrollo ambiental o sostenible?**

Si    No                      -Si respondió Si, cual(es)?/ de que tipo?

**3. ¿Existe una organización de turismo local?**

Si No -Si respondió Si, ¿Es la empresa turística parte esta organización?

**4. ¿Está la comunidad involucrada en la toma de decisiones acerca de cómo se maneja la empresa turística?**

Si No

-Si respondió Si, de que maneras esta involucrada la comunidad?

**Parte 8: Mercadotecnia y Asistencia Técnica**

**1. ¿Tiene socios u otras compañías que proveen asistencia de mercadeo o ventas?** (Operador turístico, empresa turística, patrocinadores, organización no gubernamental, etc.

**2. ¿Qué tipo de asistencia en el pasado ha ayudado más a desarrollar la empresa con respeto a:** aumentar el número de turistas que utilicen sus servicios, aumentar la facilidad de realizar operaciones, mejorar relaciones con socios y gente de la zona, y aumentar la armonía con el medioambiente natural?

**Efectividad**

**¿quien la proveía?**

Asistencia	Muy Efectivo	Efectivo	Poco efectivo	No es efectivo	N/A	Empresarial Indiv.	S.A.	Org. comunitaria	El gob.	ONG	Otro
Enfoques Administrativos (contabilidad, reservaciones, servicio al cliente)											
Asistencia de Mercadeo											
Cap. para el desarrollo de Personal/ Operaciones											
Cap. de "Buenas Practicas" (Sociales y Medioambientales)											
Cap. de Guías											
Cap. de Internet											
Enlazar proyectos con socios potenciales de mercadeo											
Cap. del Idioma											

**3. ¿Qué medios publicitarios han sido de mayor utilidad/ han generado más reservas?**

Medios	Muy efectivo	Efectivo	Poco efectivo	No es efectivo	No aplica	No Sabe
Por empresas turísticas locales						
Cartel, Valla o Pasacalle						
Recomendación verbal (de boca en boca)						
Guías turísticas (especifique cuales)						
Internet (especifique cuales sitios)						
Periódicos/revistas (especifique cuales)						
Feria comercial						
Por gente de la zona						
Operadores Turísticos (especifique cuales)						
El gobierno						
ONGs (especifique cuales)						
Otros (especifique)						

**4. ¿Recibe el personal de la empresa turística capacitación o entrenamiento?**

Si No -Si respondió Si, cuales/ de que tipo?

**5. ¿Recibe la gente de la comunidad algún tipo de capacitación o entrenamiento?** Si

No -Si respondió Si, cuales/ de que tipo?

**6. ¿Qué tipo de capacitación considera prioritaria para los dueños y el personal?**

Capacitación	Muy Necesitada	Poco Necesitada	No es Necesitada	No Aplica
Gerencial Admón. de empresas Contabilidad				
Desarrollo de Personal/ Operaciones				
"Buenas Practicas" Sociales y Medioambiente				
Mercadotecnia/Internet				
Guías				
Otros:				

**7. ¿Qué tipo de capacitación has sido mas efectiva?**

Talleres Programas de intercambio Otro (especifique):

**Parte 9: Limitaciones**

**1. ¿Cuáles son las limitaciones más impactantes con respecto al desarrollo y la operación de la empresa?**

☐ No hay suficientes clientes    ☐ Comunicaciones con socios  
☐ Ubicación remota    ☐ Habilidades (especifique): ☐ Otro (especifique):  
☐ Carencia de publicidad    ☐ Divisiones en la comunidad

**Por favor escriba otros asuntos de valor de las operaciones de turismo comunitario que no fueron mencionados en el cuestionario.**

**Gracias por completar el cuestionario**

Dalia Lara Morales  
 dalia.morales@student.anglia.ac.uk  
 Tel: 771 2446630

## Appendix B: Personnel Interviews and Questionnaire

Buenos días, mi nombre es Dalia Lara, me encuentro haciendo una investigación sobre la sostenibilidad de proyectos ecoturísticos y su cadena de valor en comunidades indígenas de México. Podría usted ser tan amable de contestar las siguientes preguntas de acuerdo a la empresa ecoturística en la que trabaja. Tomara alrededor de 10 minutos. Este cuestionario es confidencial y anónimo.

<b>1. ¿Cuál es su trabajo en la empresa y cuando empezó a trabajar ahí?</b>
<b>2. ¿Pertenece usted a alguna cultura indígena? Si / No - ¿Cual?</b>
<b>3. ¿Recibió o recibe capacitación o entrenamiento para realizar su trabajo?</b>
Si / No -Si, ¿quién lo capacita?
<b>4. ¿Cuenta con algún certificado de estudios?</b>
Si / No - Si, favor de especificar:
<b>5. ¿Es la actividad turística favorable para la comunidad local?</b>
Si / No -Por favor de explicar sus razones:
<b>6. ¿Se beneficia usted personalmente de la actividad turística?</b>
Si / No -Si, por favor de explicar sus razones:
<b>7. ¿Alguien más de su casa se beneficia del turismo?</b>
Si / No -Si, por favor de explicar sus razones:
<b>8. ¿Cree usted que la comunidad en general se beneficie de la actividad turística?</b>
Si / No -Si, por favor de explicar sus razones:

**La actividad turística:**

<b>9. ¿Crea empleos para la gente local/ indígena?</b>
--

Si / No
<b>10. ¿Emplea gente joven?</b>
Si / No
<b>11. ¿Aumenta o disminuye el precio local de los alimentos/bienes?</b>
Aumenta / Disminuye
<b>12. ¿Ayuda a la obtención de infraestructura y servicios (ej. escuelas, calles, etc.) para la comunidad local?</b>
<b>13. ¿Aumenta o disminuye la delincuencia en la región?</b>
Aumenta / Disminuye
<b>14. ¿Cambia el comportamiento de las personas de la comunidad? (Ej. vestimenta, comida, bebida, lenguaje, etc.)</b>
Si / No -Por favor de explicar sus razones:
<b>15. ¿Daña o destruye la naturaleza?</b>
Si / No
<b>16. ¿Limita (a la gente de la comunidad) de alguna manera el acceso a determinadas áreas?</b>
Si / No -¿cuáles?
<b>17. ¿Aumenta la creación de artesanía y/o genera otras actividades culturales?</b>
Si / No -¿cuáles?
<b>18. ¿Usa los recursos que gente de la comunidad necesita, como la leña y el agua? Sí / No - Si, ¿cuáles?</b>
<b>19. ¿Tiene la comunidad algún control sobre la actividad turística?</b>
Si / No -Por favor de explicar:
<b>20. ¿El dinero gastado por los turistas se queda en la comunidad local?</b>
Si / No -No, ¿a dónde se va?
<b>21. ¿Pueden los miembros de la comunidad visitar las inmediaciones del desarrollo turístico? Si / No</b>
<b>22. ¿Proporciona la empresa turística capacitación o entrenamiento al personal? Si / No -Si, favor especificar:</b>
<b>23. ¿Proporciona la empresa turística información y/o capacitación sobre naturaleza y cultura a los miembros de la comunidad? Si / No -Si, favor especificar:</b>
<b>24. ¿Te gustaría tener más o menos turismo en tu región?</b>

Más / Menos -¿por qué?
<b>25. ¿Existe algo que te moleste sobre la actividad turística en tu comunidad?</b>
Si / No -Si, favor especificar:

<b>26. ¿Cuál es su género:</b> Hombre / Mujer	<b>Edad:</b>
<b>27. ¿Cuánto gana usted a la semana aproximadamente?</b>	
Menos de \$500    de \$501-\$1,000    de \$1,001-\$1,500    Más de \$2,000	
<b>28. ¿Cuántos días trabaja usted a la semana?</b>	
<b>29. ¿Qué tan lejos se encuentra su casa de la empresa turística?</b>	
<b>29. ¿Cuánto tiempo ha vivido ahí?</b>	
<b>30. ¿Donde vivía antes?</b>	
<b>31. ¿Donde vive cuando se encuentra trabajando en la empresa turística?</b>	
<b>32. ¿Cómo llega de su casa a su trabajo y del trabajo a su casa?</b> (medio de transporte)	
<b>33. ¿Sabe de alguna queja por parte de las personas de la comunidad en cuestiones de la actividad turística?</b> Si / No    ¿cual(es)?	
<b>34. ¿Sabe de alguna queja por parte de los turistas?</b> Si / No    -¿cuáles?	
<b>35. ¿Tiene algún otro comentario sobre la actividad de la empresa turística?</b>	

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### Appendix C: Local Community Interview and Questionnaire

Buenos días, mi nombre es Dalia Lara, me encuentro haciendo una investigación sobre la sostenibilidad de proyectos ecoturísticos y su cadena de valor en comunidades indígenas de México. Podría usted ser tan amable de contestar las siguientes preguntas. Tomara al rededor de 10 minutos. No es necesario que escriba su nombre, este cuestionario es confidencial y anónimo.

<b>1. ¿Pertenece usted a alguna cultura indígena?</b> Si / No    - ¿cuál?
<b>2. ¿Es la actividad turística favorable para la comunidad local?</b>
Si / No    -Por favor de explicar sus razones:
<b>3. ¿Se beneficia usted personalmente de la actividad turística?</b>

Si / No    -Si, por favor de explicar sus razones:
<b>4. ¿Alguien más de su casa se beneficia de la actividad turística?</b>
Si / No    -Si, por favor de explicar sus razones:
<b>5. ¿Cree usted que la comunidad en general se beneficie de la actividad turística?</b>
Si / No    -Si, por favor de explicar sus razones:

**La actividad turística:**

<b>6. ¿Crea empleos para la gente local/ indígena?</b>
Si / No
<b>7. ¿Emplea gente joven?</b>
Si / No
<b>8. ¿Aumenta o disminuye el precio local de los alimentos/bienes?</b>
Aumenta / Disminuye
<b>9. ¿Ayuda a la obtención de infraestructura y servicios (ej. escuelas, calles, etc.) para la comunidad local?</b>
<b>10. ¿Aumenta o disminuye la delincuencia en la región?</b>
Aumenta / Disminuye
<b>11. ¿Cambia el comportamiento de las personas de la comunidad? (ej. vestimenta, comida, bebida, lenguaje, etc.)</b>
Si / No    -Por favor de explicar sus razones:
<b>12. ¿Daña o destruye la naturaleza?</b>
Si / No
<b>13. ¿Limita de alguna manera el acceso a determinadas áreas? (a la gente de la comunidad)</b>
Si / No    -¿cuáles?
<b>14. ¿Aumenta la creación de artesanía y/o genera otras actividades culturales?</b>
Si / No    -¿cuáles?
<b>15. ¿Usa los recursos que gente de la comunidad necesita, como la leña y el agua? Si / No    - Si, -¿cuáles?</b>
<b>16. ¿Tiene la comunidad algún control sobre la actividad turística?</b>
Si / No    -Por favor de explicar:
<b>17. ¿El dinero gastado por los turistas ¿se queda en la comunidad local?</b>



Si / No -No, a ¿dónde se va?
<b>18. ¿Pueden los miembros de la comunidad visitar las inmediaciones del desarrollo turístico?</b> Si / No
<b>19. ¿Proporciona la empresa turística información y/o capacitación sobre naturaleza y cultura a los miembros de la comunidad?</b> Si / No -Si, favor especificar:
<b>20. ¿Te gustaría tener mas o menos turismo en tu región?</b> Más / Menos -¿por qué?
<b>21. ¿Existe algo que te moleste sobre la actividad turística en tu comunidad?</b> Si / No -Si, favor especificar:
<b>22. En su opinión, ¿qué se puede hacer para que el turismo sea mejor en su comunidad?</b>
<b>23. ¿Cuál es su género?:</b> Hombre / Mujer <b>Edad:</b>
<b>24. ¿Se encuentra trabajando actualmente?</b> Si / No -Si, favor especificar:
<b>25. ¿Cuánto gana usted a la semana aproximadamente?</b> <div style="display: flex; justify-content: space-between;"> <div>-menos de \$100</div> <div>-de \$101-\$300</div> <div>-de \$301-\$600</div> </div> <div style="display: flex; justify-content: space-between;"> <div>-de \$601-\$900</div> <div>-de \$901-\$1,200</div> <div>-de \$1,201-\$1,500</div> </div> <div style="display: flex; justify-content: space-between;"> <div>-de \$1,501-\$1,800</div> <div>-de \$1,800-\$2,000</div> <div>mas de \$2,000</div> </div>
<b>26. ¿Cuántos días trabaja usted a la semana?</b>
<b>27. ¿Sabe de alguna queja por parte de las personas de la comunidad en cuestiones de la actividad turística?</b> Si / No -¿cuál(es)?
<b>28. ¿Tiene usted algún otro comentario sobre la actividad de la empresa turística?</b>

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#### Appendix D: Participant information Form

##### Ficha Informativa de Participación

Se le invita a participar en el estudio de investigación de doctorado , que es una investigación en colaboración con la Organización Internacional de Derecho del Desarrollo (IDLO) . La razón por la que hemos contactado con usted es porque usted es un empleado de EcoAlberto el Gran Cañón y / o un residente de El Alberto. Antes de decidir si desea participar es importante que usted entienda por qué la investigación se está haciendo y lo que implica. Por favor tome tiempo para leer cuidadosamente la siguiente información y pedir al investigador si hay algo que no entiende o desea más información.

Este estudio se propone examinar el potencial para el turismo sostenible para apoyar el desarrollo sustentable de beneficios que los ecosistemas y las comunidades indígenas mediante la realización de un análisis de la cadena de valor del turismo y entre sus otras tres comunidades indígenas (mencionado anteriormente) en México y Chile con el fin de desarrollar un marco conceptual que contiene recomendaciones para ayudar a las prácticas y políticas que pueden ser relevantes para estas comunidades, así como otras comunidades indígenas de América Latina y el mundo del ecoturismo.

Se le pedirá que participe en uno-a- uno o grupos de entrevistas y / o responder a un cuestionario de la encuesta . La encuesta se llevará a 5-10 minutos mientras que la entrevista puede tomar 30 a 40

minutos aproximadamente. Se pretende que sea una oportunidad para que usted exprese sus puntos de vista sobre el asunto. La entrevista será grabada y transcrita en esta última forma de texto. La grabación de las entrevistas se borrará en la transcripción. El investigador también tiene como objetivo hacer un documental en vídeo de esta investigación y es posible que también se le preguntará si desea participar en él. Usted sería muy bienvenida a una copia del informe final.

Como parte de la presentación de los resultados, sus propias palabras se pueden utilizar en la forma de texto o de vídeo. Esta será anónimo por lo que no puede ser identificado a partir de lo que dijiste. Tenga en cuenta que:

- Usted puede decidir detener la entrevista en cualquier momento
- Usted puede decidir no responder a las preguntas que no desea
- Usted puede decidir no participar en las tomas fotos ni el video documental por no llenar el vídeo y Formulario de Consentimiento de fotos.

Depende de usted decidir si participan o no. Si usted decide participar sigues siendo libre de retirarse durante la entrevista o en cualquier momento hasta 30 días sin dar una razón y sus datos serán destruidos inmediatamente. Si a usted le gustaría hablar de algo más, por favor póngase en contacto conmigo en la dirección anterior.

Si usted decide participar se le dará la hoja de información y una copia del formulario de consentimiento.

## **Gracias**

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## **Appendix E: Participant Consent Form**

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### **Formulario de Consentimiento Participante**

1. Estoy de acuerdo en participar en la investigación anterior. He leído la hoja de información del participante, que se adjunta a este formulario. Entiendo que mi papel será en esta investigación, y todas mis preguntas han sido contestadas a mi satisfacción.
2. Entiendo que tengo la libertad de retirarse de la investigación en cualquier momento, por cualquier razón y sin prejuicios.
3. He sido informado de que la confidencialidad de la información que proporcione será salvaguardada.
4. Soy libre de hacer cualquier pregunta en cualquier momento antes y durante el estudio.
5. Se me ha entregado una copia de este formulario y la hoja de información del participante.

Protección de datos: Estoy de acuerdo con la Universidad y la Organización Internacional de Derecho del Desarrollo (IDLO), el tratamiento de datos personales que he suministrado. Estoy de acuerdo en el tratamiento de dichos datos para fines relacionados con el proyecto de investigación tal como se indica a mí.

Nombre del participante .....  
Firmado ..... Fecha.....

Se le dará UNA COPIA DE ESTE FORMULARIO PARA MANTENER

Si desea retirarse de la investigación, por favor completa el siguiente formulario y volver al principal investigador nombrado arriba.

Título del proyecto: **"Desarrollo de prácticas de ecoturismo sostenible y políticas de las comunidades indígenas de México "**

**Deseo** retirarme de este estudio

Firma: \_\_\_\_\_ Fecha: \_\_\_\_\_

#### Appendix F: List of Participant during Fieldwork 2013 and 2014

Participants interviewed that have been referenced in this thesis.

Fieldwork 2013			Fieldwork 2014		
Pseudonym	Age	Activity	Pseudonym	Age	Activity
Adolfo	40	Hñahñu chief	Martha	35	Ixmiquilpan City Council employee
Felix	44	Hñahñu chief	Artemisa	43	Independent artisan
Julio	29	Community service	Raula	31	Agua EcoAlberto Employee
Miguel	45	Community service	Juan	72	Hñahñu elder
Ivan	24	Boat guide	Heriberto	37	Hñahñu migrant
Karen	24	Waitress	Guillermo	51	Hñahñu migrant
Juana	50	Cook	Pedro	52	Hñahñu harvester
Malena	31	Cook	Silvia	45	Hñahñu member
Rosita	28	Waitress	Lucia	36	Food trader
Felipe	64	Hñahñu chief	Sarah	33	UK ecotourist
Noelia	80	Hñahñu elder	Naycir	25	Street vendor
Amada	55	Women cooperative	Jose Luis	56	Food trader
Alma	60	Women cooperative			
Maria	18	Community service			
Arturo	26	Hñahñu chief			
Gloria	31	Stall seller			
Juan	51	Hñahñu memeber			